Jira Align

Administration guide

v.11.1.0 and above, August 2024

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Administration

Access controls and logs

Activity

On the activity page, you can track the user activity by users' names and roles. From this page, you can access the user profiles, roles, and announcements.

To navigate to the activity page:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Activity** in the **Access Controls** section.

People

With Jira Align, you can allocate people to specific roles and security permissions. Data security is based on the team assignment. Users can be assigned to cost centers to track financial metrics and availability.

Selecting the user names takes you to the Edit User page, where you can edit their information.

Login activity

In the **Login Activity** section, you can track by an IP address, date and time the most recent users who signed into Jira Align. For more details, select **Activity**. To restrict inactive users, deactivate the users on their Edit User page.

Roles

With Jira Align, you can customize access by designing access-based roles to control navigation and button access. Jira Align provides default roles or you can create and copy custom roles to meet your needs.

Learn more about roles available in Jira Align in these two topics: Jira Align roles and Set system and team roles/permissions.

Announcements

With Jira Align, you can notify your users about system updates, company updates, and other announcements
The list shows active and inactive announcements for your Jira Align instance.

Changes

Activity logs give information about changes in the application: type, date, and details of a change, and a user who made it. They help you track the changes made in the product over time.

Review activity logs on the changes page:

1. Select the **Settings gear** in the top navigation bar.
2. On the left side of the page, select **Changes** in the **Logs** section.

At the top of the activity logs, select a date range from the dropdown menu next to the search box to view items that were created or updated within the selected timeframe.

You can also filter the activity logs by user ID and specific details. To filter the search, select **Apply Filters**.

Use trend

To navigate to the use trend page:

1. Select the **Settings gear** in the top navigation bar.
2. On the left side of the page, select **Use Trend** in the **Logs** section.

The **Total Logins** chart shows the user activity over the years, particularly, a number of logins in a year broken down by weeks. You can print this chart or export it as a .pdf or an image by selecting the triple line icon .

Under **Login Activity**, you can track by an IP address, date and time the most recent users who signed into Jira Align.

Under **Invalid Login Activity**, check the reason why the login was invalid for a certain user.

To restrict inactive users, deactivate them on their Edit User page.

All login data includes both manual and SSO login activity.

Application settings

Configure identification and work codes

From the time tracking settings page, you can create, update, and search for identification and work codes. To view the codes, you need to do a search first.

Note: To access this settings page, your system role must have the **Administration > Work Code Admin** permission enabled.

To create an identification or a work code:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. Select **Time Tracking** under **Settings**.
3. Under **Manage Identification Codes and Work Codes**, click **Create New**.
4. In the **Work Code** box, type a name for the work code.
5. From the **Type** drop-down menu, select the work code type.
   Note: You cannot change the work code type after it is created.
6. In the **Description** box, type a short description of the work code.
7. Click in the **Cost Center** box, and then select the cost centers to which you want to assign the work code.
8. From the **State** drop-down menu, select whether the code is enabled or not.
9. Click **Save**.
   Note: To edit a code, search for the code, and then click the **Edit** link next to it.

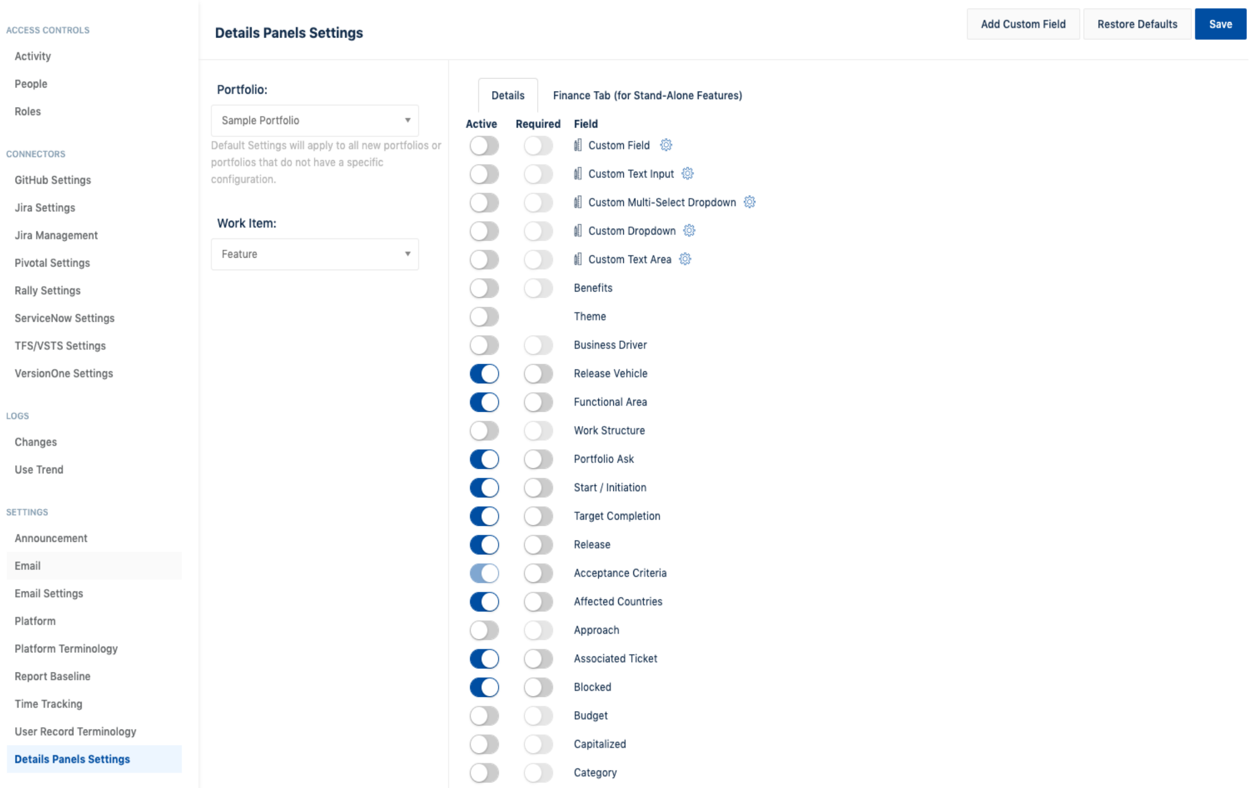
To filter identification and work codes:

1. Click the **Apply Filters** button next to the search field to add the filtering criteria.
2. In the dialog box that displays, select your filtering criteria from the drop-down menu.
3. To further refine the filter, click the plus sign next to the drop-down menu to activate another field where you can add specific search strings to include in the filter.
4. Click the **Filter** button to view the results.

Configure default and custom fields

In Jira Align, you can customize field settings on most work items. You may specify what fields are visible and accessible to users from an item's details panel, and what fields must be filled out to create a new work item. These settings can be unique for each work item type and have the option to be portfolio-specific*.

You can also create custom fields to capture attributes specific to your organization. Each work item type supports multiple custom fields.



Supported work items

The following work items allow you to create custom fields, modify field visibility, and set fields as required:

- Themes*
- Capabilities
- Epics
- Features
- Stories
- Tasks
- Defects
- Test Cases
- Objectives
- Dependencies
- Risks
- Success Criteria

***Note:** Theme field settings are global, instead of portfolio-specific.

Display and require fields

To manage field settings for a work item:

1. Select the **Settings gear** in the top navigation bar.
2. On the left side of the page, select **Details Panels Settings** in the **Settings** section.
3. Select a portfolio from the **Portfolio** dropdown.
4. Select a work item type from the **Work Item** dropdown. The list of default and custom fields displays on the right side of the page.
5. If your work item type supports multiple tabs in its details panel, each tab will display on the right side of the page. Select the tab name to see the fields it contains.
6. To display a field and make it accessible on Details panels, switch on its **Active** toggle . To hide a field from users, switch the toggle off . Note that fields with light blue toggles cannot be hidden.
7. To require that a field contain data when creating a new work item or saving edits to an existing work item, switch on the **Required** toggle . A field must be active to be required.
8. Select the **Save** button from the upper-right section of the page.

To restore the default Active and Required settings for a work item and portfolio set, select the **Restore Defaults** button from the upper-right corner.

Notes:

- Access to the details panels settings page requires that the **Details Panels Settings** system permission toggle is switched on. Switching on the **Details Panel Settings** toggle will enable a set of child toggles that control access to field settings for each work item type. These permission toggles are all switched on by default for the Super Admin role. You may switch on the toggles for other system roles on the roles settings page.
- When creating new work items, fields will display on the side panel using the default work item settings first. Once a program has been selected, the panel will update according to your saved settings for the portfolio.

Create and manage custom fields

Custom fields are global. When you create a new custom field, any portfolio may use it. As with default fields, active and required status can be unique to each portfolio. Custom fields can be identified in the details panels settings page by the gear icon

to the right of their names.

Supported field types

Each work item type supports a number of different custom fields:

- Custom Text Input -- Up to 2 fields
  - A small text entry box, intended for words or short phrases.
- Custom Dropdown -- Up to 3 fields
  - A dropdown list of choices, where one selection can be made.
- Custom Text Area -- 1 field allowed
  - A larger text entry box with some Rich-Text Formatting abilities, intended for paragraphs.
- Custom Multi Dropdown -- Up to 2 fields
  - A dropdown list of choices, where one or more selections can be made.

Create custom fields

To create a new custom field:

1. Select the **Settings gear**

   in the top navigation bar.
2. On the left side of the page, select **Details Panels Settings** in the **Settings** section.
3. Select a portfolio from the **Portfolio** dropdown.
4. Select a work item type from the **Work Item** dropdown. The list of default and custom fields displays on the right side of the page.
5. Select the **Add Custom Field** button from the upper-right section of the page. The **Customize Your Page Level Experience** menu displays.
6. Select a field type for the new field from the **Custom Field Type** dropdown.
7. Enter a name for the custom field in the **Custom Field Label** text box.
8. Select **Create** at the bottom of the menu to create the custom field.
9. If you selected the dropdown or multi dropdown field type in step 3, you'll need to add options for the field. Enter a name for the first field value in the **Option 1** text box that displays.
   a. Select **Add Item to List** to add another field value. An **Option 2** text box will display. Repeat for as many field values as you need.
   b. Select **Save** to save the list of values.

10. The new custom field displays on the details panels settings page, and can be set as active and required.

To change an existing custom field's name, select the **gear icon**

to the right of the field. You can also edit the field values for dropdown fields through this menu. You cannot change the field's type after creation.

Important: After a custom field has been created, it cannot be deleted.

Configure terminology

All major objects in Jira Align can be renamed to more closely match your processes, especially when working with external tools such as Jira, Team Foundation Server, or others. You can configure different terminology sets according to such frameworks as SAFe (Scaled Agile Framework), DAD (Disciplined Agile Delivery), and LeSS (Large-Scale Scrum), depending on what system your company uses. Or you can use the system default terminology.

You can configure general terminology used throughout the product, top menu terminology, date labels used for waterfall projects, release vehicle terminology, financial terminology, and terminology used on the person's record page.

Important: If you're using the [Flexible Terminology] feature in Jira Data Center, your Jira connector doesn't sync platform terminology. You will need to update terms in each product separately.

To configure terminology:

1. Select the **Settings gear** in the top navigation bar.
2. On the left side of the page, select **Platform Terminology** under **Settings**.
3. From the **Terminology Shown** drop-down menu, select the terminology set you want to use.
4. Edit the fields you want to change, and then click **Update Terminology**.
   Note: When updating the **Currency** and **Finance** terminology, click **Update Currency** or **Update Finance** accordingly.
5. Under **Customize Pyramid Display**, select which areas to display in the pyramid.
   Note: To view the pyramid, go to the strategy room.
6. Click **Update Pyramid**.
   Important: You must sign out and sign back in to see the updates.

Note: The **Description** fields provided for object terminology are primarily for internal use, to communicate to other Jira Align admins and leaders how you intend to use the object. Some objects that have been selected to display on the Strategy Pyramid will also show the contents of their Description field on the pyramid. These items include:

- Mission
- Vision
- Values
- North Star
- Long Term Goal
- Long Term Strategy
- Yearly Goal

To configure person record terminology:

1. Select the **Settings gear** in the top navigation bar.
2. On the left side of the page, select **User Record Terminology** under **Settings**.
3. Edit the fields you want to change, and then click **Update Terminology**.

Terminology sets

All major objects in Jira Align can be renamed to more closely match your processes, especially when working with external tools such as Jira, Team Foundation Server, or others. You can configure different terminology sets according to such frameworks as SAFe (Scaled Agile Framework), DAD (Disciplined Agile Delivery), and LeSS (Large-Scale Scrum), depending on what system your company uses. Or you can use the system default terminology.

The following table shows how terms are named according to different terminology sets. You can configure terminology in your platform terminology settings.

SAFe 2.5	SAFe 3.0	SAFe 4.0	DAD	LeSS
Capability	Capability	Capability	Capability	Capability
Checklist	Checklist	Checklist	Checklist	Checklist
Demo Company	Demo Company	Demo Company	Demo Company	Demo Company
Dependency	Dependency	Dependency	Dependency	Dependency
Driver	Driver	Business Driver	Goal	Driver
Epic	Epic	Epic	Epic	Epic
Escalation	Escalation	Escalation	Escalation	Escalation
Feature	Feature	Feature	Feature	Feature
Functional Area	Functional Area	Business Unit	Functional Area	Functional Area
Idea	Idea	Idea	Idea	Idea
Interactive Image	Interactive Image	Interactive Image	Interactive Image	Interactive Image
Investment Type	Investment Type	Investment Type	Investment Type	Investment Type
Long-Term Goal	Long-Term Goal	Long-Term Goal	Long-Term Goal	Long-Term Goal
Mission	Mission	Mission	Mission	Mission
Monthly Goal	Monthly Goal	Monthly Goal	Monthly Goal	Monthly Goal
Objective	Objective	Objective	Objective	Objective

Organization Structure	Organization Structure	Organization Structure	Organization Structure	Organization Structure
Portfolio	Portfolio	Portfolio	System	Product
Product	Product	Product	Product	Requirement Area
Program	Program	Program	Program	Scrum of Scrums
Project	Project	Project	Project	Project
Quarterly Goal	Quarterly Goal	Quarterly Goal	Quarterly Goal	Quarterly Goal
PSI Release	Program Increment	Program Increment	Release	PSPI - Potentially Shippable Product Increment
Release	Release	Release	Transition	Release Vehicle
Solution	Solution	Solution	Solution	Solution
Specification	Specification	Specification	Specification	Specification
Iteration	Iteration	Iteration	Iteration or Scrum	Sprint
Strategic Driver	Strategic Driver	Strategic Driver	Strategic Driver	Strategic Driver
Strategic Initiative	Strategic Initiative	Strategic Initiative	Strategic Initiative	Strategic Initiative
Success Criterion	Success Criterion	Success Criterion	Success Criterion	Success Criterion
Theme	Theme	Theme	Theme	Theme
Theme Group	Theme Group	Theme Group	Theme Group	Theme Group
UI Design	UI Design	UI Design	UI Design	UI Design
Value	Value	Value	Value	Value

Value Stream	Value Stream	Value Stream	Value Stream	Value Stream
Vision	Vision	Vision	Vision	Vision
Yearly Goal	Yearly Goal	Yearly Goal	Yearly Goal	Yearly Goal

Team settings

In this section, you can decide what settings to configure for your team.

To manage team settings:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Platform** in the **Settings** section.

In Jira Align, you can configure the following team settings:

- **Max Task Size In Hours:** Controls the maximum size of a task. Lower task sizes encourage better estimates.
- **Points System:** Controls which scheme of numbers is available to the team when voting on the size of a story. This also controls how WSJF is calculated (if applicable).
- **Velocity Range (+ or -):** This number is a percentage of total points. It directly affects the distribution/range of the pessimistic, predicted, and optimistic forecast lines users see in Program Increment Progress reports under Drill Down. These lines help portfolio and program leaders create a high-level forecast based upon teams' velocity variability.
- **Default Days in Sprint:** Controls the most common sprint duration. If you need multiple sprint durations, you can configure it. Best practice is to have one sprint duration for the enterprise.
- **Points to Hours Conversion:** This is an optional setup that can be used to convert points to hours for teams that do not use tasks or hours. Each team's setup is tracked by hours, points, or cycle time.
- **Days in Sprint Minus Ramp:** Allows you to build ramp time. For example, if you create a ten-day sprint, you can configure this setting to nine days to hold back a day for planning.
- **Manage Dependencies:** Allows you to customize which dependency types are possible to create. You can view all possible dependency combinations and turn them on or off. **Agile Team to Agile Team** is always turned on and not configurable.
- **Manage Products:** Turns on or turns off the product option when creating features and on the top navigation bar. This is necessary for organizations that need distinct programs and distinct products. Many organizations can align products and programs, which makes this setting unnecessary.
- **Manage Organizations:** Turns on or turns off the **Organization Structure** field on the feature details slide-out.
- **Enable Defect Allocation:** Turns on or turns off a concise bucket to allocate and track time against defect fix, search, and verification. This is a strong method to stream defect management in contrast to adding every defect to the backlog.
- **Enable Backlog Chain Link:** Turns on or turns off the story sequence on the features page. With the **Story Sequence** option, you can view and prioritize stories belonging to a certain feature.
- **Enable Item Link**. Turns on or turns off the links functionality (**Links** tab) to sequence work items. It is used to create a link from one theme, epic, capability, feature, or story to another one to define that the work item cannot be started before the other one is finished.
- **Start and End Sprint Automatically:** Controls if a sprint starts and ends automatically. With this setting enabled, sprints will start automatically at 11:59 PM on the first day of a sprint and end automatically at 11:59 PM on the last day of a sprint. It is especially useful for modern Agile teams that aren't using Scrum ceremonies and don't want to spend time on events that will happen anyway. With the option disabled, sprints will start only by a user's action. This doesn't apply to any teams integrated with the Jira connector.

Program settings

To manage program settings:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Platform** in the **Settings** section.
3. Select the **Program** tab.

In Jira Align, you can configure the following program settings:

- **Hide Feature Sorting:** Controls visibility of the feature sort in the program backlog. The epic sort and stand-alone feature sort is always available. Depending on your process, you may or may not want to sort features within the epics.
- **Use Global F/E Sorting:** Controls visibility of the All Epics and Features sort in the program backlog for a PI. Most organizations sort backlogs at the program level.
- **Use Global Stories Sorting:** Controls visibility of the All Stories sort in the program backlog for a PI. Most organizations sort backlogs at the program level.
- **Enable Conversations:** Turns on or turns off the collaboration option in the application. Collaboration is highly encouraged in agile environments; however, some organizations want to keep collaboration in email or other applications.
- **HotFix Bandwidth:** Controls the desired bandwidth for hotfixes, fast tracks, and service packs. The concept is to limit the work in process to this threshold.
- **Show EVM Calculations:** This setting is no longer active and does not affect pages in Jira Align.
- **EVM Billing Rate:** This setting is no longer active and does not affect pages in Jira Align.
- **EVM Epic Multiplier:** This setting is no longer active and does not affect pages in Jira Align.
- **EVM Story Multiplier:** This setting is no longer active and does not affect pages in Jira Align.

Solution settings

To manage solution settings:

1. Select the **Settings gear** in the top navigation bar.
2. On the left side of the page, select **Platform** in the **Settings** section.
3. Select the **Solution** tab.

In Jira Align, you can configure the following solution settings:

- **Enable Capabilities:** Turns on or turns off the visibility of capabilities on the menus. If you're using the new navigation, this also will display the **Solutions** menu in the top navigation bar if you have access to solutions. To turn capabilities on for specific portfolios, go to **Portfolio Specific Configuration**. Once capabilities are enabled, they cannot be turned off.
- **Span Capabilities Across Program Increments:** Controls the ability to span capabilities across the PI boundaries for your process.
- **Enable Solution Menu:** Turns on or turns off the **Solutions** menu from the top navigation bar. To view the solutions menu, this must be set to **Yes** *and* you must have access to a solution.

Portfolio settings

To manage portfolio settings:

1. Select the **Settings gear** in the top navigation bar.
2. On the left side of the page, select **Platform** in the **Settings** section.
3. Select the **Portfolio** tab.

Jira Align allows you to configure the following portfolio settings:

- **Agile Framework:** Adds a specific language, estimation methods, and menus for known scaled agile frameworks. If you do not use a specific framework, select the hybrid framework.
- **Estimation System:** Controls what method is used to estimate work for epics, capabilities, and features: Team / Member Weeks, T-Shirt, or Points.
- **Display Week Estimates In:** Allows you to use either team weeks or member weeks for estimate fields on epics, capabilities, and features. Member weeks can be more precise. It will apply when the portfolio's **Estimation System** setting is set to **Team/Member Weeks**. This option is also used in financial calculations and forecasting.
- **Use RAM/RACI Workflow:** Controls additional workflow in your process flow. This option is helpful for highly regulated industries and movement agencies to assist with the compliance requirements.
- **Span Epics Across Program Increments:** Controls the ability to span epics across the PI boundaries for your process.
- **Enable Theme Groups:** Controls if theme groups are used to add an extra reporting layer above the theme level.
- **View Scorecard in Backlog:** Controls if the **Scorecard** column is available in the backlog.
- **Scorecard Configuration:** Manages scorecards that are used to formally compare and rank epics and projects.
- **Epic Intake Set:** Manages epic request data that is used to store additional information.
- **Case Development:** Manages epic custom fields that are used to provide additional information about an epic to help decide if the epic should be approved or rejected.
- **Estimation Conversions**: Set up conversions for t-shirt size for epics, power of 2, and fibonacci estimation systems into member weeks and estimated story points. Automatic conversions are also provided for team weeks and full-time equivalents per month. See how the conversions are calculated in Configure estimation settings.
- **Progress Bars:** Controls the progress bar appearance and behavior on a number of items throughout Jira Align.
- **Costing Method:** Controls if cost is calculated by a PI blended rate or by an individual cost center applicable for each resource.
- **Capitalization Method:** Controls if epics are capitalized at the task or story level for each feature.
- **Monte Carlo Simulations:** This is the number of simulations to run for Monte Carlo analysis (allowed range is from 100 to 1000). **Note:** This is a legacy setting that is no longer used by Jira Align.
- **Epic Strategy Scoring Type:** Allows you to choose the method used to score the epic for decisioning, prioritization, funding, and staffing. The following methods are available: custom scoring, value score, and WSJF.

The following portfolio settings are available to the right of a portfolio's slide-out on the Portfolio Settings page:

- **Objective Mappings:** Set the work item level that users can associate with each tier of objective. You can also set the following settings to view sections for dependencies, risks, and impediments on objective panels at all objective tiers:
  - **View:** Displays a section for Dependencies, Risks, or Impediments that are directly associated with the objective.
  - **Related:** Displays a section for Related Dependencies, Risks, or Impediments (tied to work items and their children linked to the objective, but not directly associated with the objective). To switch the **Related** toggle on, the **View** toggle must also be switched on.

See also

[Create scorecards](#)

[Create intake sets](#)

[Create custom field sets](#)

[Configure progress bars](#)

Configure progress bars

Progress bars reflect the amount of work completed for several items (either by story points or by count) over a calculated time period.

To configure the display of your progress bars:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Platform** in the **Settings** section.
3. Select the **Portfolio** tab.
4. On the **Portfolio** tab, select the **Manage Here** link next to **Progress Bars**.

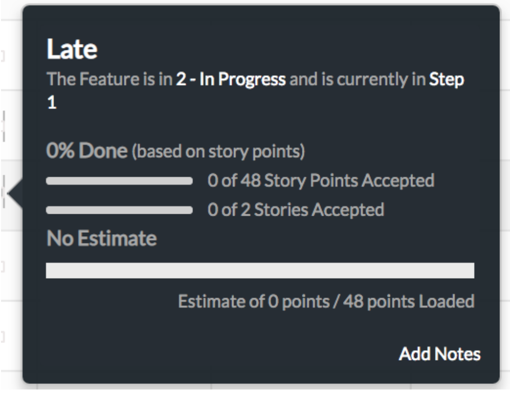
The **Progress Bars Setup** modal displays. Here, you can configure the following options:

- **Progress Bar Status:** Select how your progress will be determined in Jira Align. Select **Progress by Story Points** to calculate progress according to the number of completed story points for work items. **Progress by Count** calculates progress according to completed child work items.

  The following table provides a detailed look at how time periods and progress are determined for each item type:

Name	Time Period	Progress by Story Points	Progress by Count
Strategy	Strategic snapshot date range	Completed story points	Completed themes
Program Increment	PI dates	Completed story points	Completed features
Release Vehicle ID	Release vehicle start to release vehicle end date	Completed story points	Completed features
Sprint	Sprint start to sprint end date	Completed story points	Completed stories
Theme	First day of the earliest PI to the last day of the latest PI	Completed story points	Completed epics + completed standalone features
Epic	First day of the earliest PI to the last day of the latest PI	Completed story points	Completed capabilities if capabilities are enabled; completed features if capabilities are disabled
Capability	First day of the earliest PI to the last day of the latest PI	Completed story points	Completed features
Feature	PI dates	Completed story points	Completed stories
Story	PI dates	Completed task hours	Completed tasks
Defect	N/A	N/A	N/A

- **Progress View Type:** Choose how you would like your progress to be displayed, either as progress bars or progress dials.
- **Progress Alert Thresholds:** As time elapses for your items, you can choose for mouseover alerts to display if a minimum percentage of completed work is not met. For example, you may want a message to appear if less than 35 percent of work is completed after 50% of a period has passed.



The percentages at the top of the columns reflect time elapsed in a period. In each **Time Elapsed** column, enter the amount of work completed in order to hide late and warning messages.

Progress Alert Threshold:

Time Elapsed	10%	20%	30%	40%	50%	60%	70%	80%	90%
Late (%)	0	0	0	0	20	35	50	62	75
Warning (%)	0	0	10	20	35	50	62	75	87

- **Progress Alert On:** Select which items you would like to enable progress alerts for by selecting the check boxes next to each item type.

Configure estimation settings

The configuration page contains various options to customize Jira Align to match your company's preferred estimation method.

To configure your environment:

1. Select the **Settings gear**

   in the top navigation bar.
2. On the left side of the page, select **Platform** in the **Settings** section.
3. On the **Team** tab:
   1. From the **Point System** drop-down menu, select the point system your agile teams will use.
   2. From the **Manage Products** drop-down menu, select **Yes** for your product to be a required field on all features.
   3. Click **Save Settings**.
4. On the **Portfolio** tab:
   1. From the **Estimation System** drop-down menu, select the estimation method for features, capabilities, and epics.
   2. Next to **Estimation Conversions**, click **Manage Here**.
   3. Enter the number of story points that one person working in your organization can deliver during one week, on average, in the **As a general standard, how many story points does a person deliver in one week?** field. This value is known as a Member Week, which is the base value used to convert into other estimation systems.
   4. Select the work item type to set up conversions for from the **Work Item** dropdown: epics, capabilities, or features.
   5. Enter the number of member weeks that would typically be needed to deliver a specific t-shirt size in the **Member Weeks** boxes. You can also edit the names of the default t-shirt sizes. Additional options include:

      - **Sort** - enter a numerical value to control the order the T-shirt size row displays in dropdown menus. Lower numbers display first.
      - **X** - Click the red X icon to remove a row from the list.
      - **+ Add new size** - Click the Add new size link at the bottom of the table to add a new row.

      Important! If you sync the t-shirt size field between Jira Align and Jira through the connector, the t-shirt size names in each system must be mapped in the settings menu found via the **Configure** link at **Settings > Jira Settings > Jira Setup > T-Shirt** . If a value is not mapped between systems, sync for that work item will fail. Also, if you delete a t-shirt size for features from the Estimation Conversions menu, features that have been set with the deleted size will revert to the **No estimate** value. This automatic change will not be reflected in the feature's Audit Log. If bidirectional sync to Jira is enabled, this change will not sync to Jira until another edit is made to the feature.

      The following conversions are generated for each estimation type section in the **Estimation Conversions** dialog:

      - **Team Weeks** - calculated as Member Weeks / 6 (six members per team)
      - **FTE/mo (full-time equivalents per month)** - calculated as Member Weeks / 4 (average of four weeks per month)

   6. Repeat steps 4-5 for other work item types, as necessary.
   7. Click **Save** to close the Estimation Conversions dialog .
   8. Click **Save Settings** at the bottom of the page.

Tip: Click the **Portfolio Specific Configuration** button to select different options for each portfolio. Note that the **Estimation Conversions** menu is global and applies to all portfolios.

User record settings

To manage user record settings:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Platform** in the **Settings** section.
3. Select the **Users** tab.

Jira Align allows you to configure the following user record settings:

- **Show External ID along with First Name and Last Name:** This setting controls if the external ID appears along with the first and last name in the Team configuration. This helps to distinguish users with identical first name and last name.
- **Show Company Field:** Show a field on the user record page for **Company**. This field can be updated manually and through data import.
- **Show Company ID Field:** Show a field on the user record page for **Company ID**. This field can be updated manually and through data import.
- **Show Employee ID Field:** Show a field on the user record page for **Employee ID**. This field can be updated manually and through data import.
- **Personal User Notification:** Turns on or turns off the email notifications.
- **Show Tips On Forms:** Sets the default for showing tips on forms to off or on.
- **Menu Image Type:** Sets the type of images that show in the track menu.
- **A Non-Contractor Can Be Their Own Manager:** Allows non-contractors to be their own managers. You can select the user's own name from the **Manager** drop-down menu on the user's record page.
- **A Contractor Can Be Their Own Contractor Manager:** Allows contractors to be their own contractor managers. You can select the user's own name from the **Contractor Manager** drop-down menu on the user's record page.
- **Time Approvers Can Approve Their Own Time:** Allows time approvers to approve their own time. You can select the user's own name from the **Time Approver** drop-down menu on the user's record page.
- **Set User End Date:** This setting controls the number of days from the current date that administrators can backdate a User End Date on the user's record page.

General settings

To manage general settings:

1. Select the **Settings gear** in the top navigation bar.
2. On the left side of the page, select **Platform** in the **Settings** section.
3. Select the **General** tab.

In Jira Align, you can configure the following general settings. This can be useful for environments that do not have access to the Internet so you can configure such links as Help and Support to send people to internal sites for these services:

- **Show “Support” Link:** Shows the **Support** link throughout Jira Align. With this link, you can access the **Support** website. You can configure the **Support** link when this option is set to **Yes**.
- **“Support” Link:** Set this value to a URL that you want to direct users to when they click **Support**. By default, the link goes to the Zendesk Support website.
- **Show “Help” Link:** Shows the **Help** link throughout Jira Align. With this link, you can access the **Help** website. You can configure the **Help** link when this option is set to **Yes**.
- **“Help” Link:** Set this value to a URL that you want to direct users to when they click **Help**. By default, the link goes to the Zendesk Help Center.
- **Show "Help" Button:** Shows the **Help** icon in the top navigation bar (new navigation only) or the blue **Help** button in the lower-right corner of each page (old navigation only). Selecting the button opens context-sensitive help articles and required privacy information in a slide-out panel. This setting is always set to **Yes.**
- **Enable Server Requests:** Make API requests from the server to get help and support content to display in the application. This requires Internet access to agilecrafthelp.zendesk.com. Turning off this option will hide the Help button at the bottom right of each page as well as prevent updates from being displayed on the **Announcements** page.
- **Enable Training Simulations:** Allows users to access interactive training videos from the **Training Simulations** tab on a checklist panel.
- **Global Color Settings:** Sets object/status color on variety of reports and panels, such as:
  - Story, feature, and epic slide out (progress circle)
  - Portfolio room
  - Team room
  - Backlog kanban cards
  - Sprint meetings
  - Work tree
  - WIP report

Create scorecards

A scorecard is a list of questions and answers to them that are aimed to characterize the project. Scorecards allow organizations that score and rank projects in their portfolio to execute their strategic planning process. The PMO evaluates the project according to the scorecard questions and scores the project based on the answers. You can score epics and capabilities on the **Value** tab of their Details panel.

To create a scorecard:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Platform** in the **Settings** section.
3. On the **Portfolio** tab, click **Manage Here** next to **Scorecard Configuration**.
4. Type the scorecard's name and description in the corresponding boxes, and then click **Add**.
5. Type your question in the **New Question** box, type its point value, and then click **Add**.
6. Type an answer to the question and the percentage from the question's points you get for that answer, and then click **Add**.
   Note: Points you get for an answer are automatically calculated based on the question's points and answer's percentage.
7. Repeat Step 6 for as many answers as you have.
   Note: The answer ranked as the first one in the list will be the default selection.

To edit a scorecard:

1. Select the necessary scorecard from the **Edit Scorecard** drop-down menu.
2. Edit a question or an answer. The changes are saved automatically.
   Note: You can move your questions and answers by clicking up and down arrows. To delete your question or answer, click the cross sign next to it.

Create intake sets

The intake form is used to store additional information about an epic. This is the information your organization wants to collect about every project. The default intake form appears when you create an epic and contains such fields:

- Justification
- Department
- Requestor
- Reviewer
- Approver

You can also create custom intake forms and apply them to epics. Custom intake forms may be applied portfolio-wide, or alternatively, to individual programs. For the steps on how to apply an intake form to an epic, see the Manage epics > Intake section.

To create an intake set:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Platform** in the **Settings** section.
3. On the **Portfolio** tab, click **Manage Here** next to **Epic Intake Set**.
4. Type the name in the **Intake Set Name** box, and then click **Add**.
5. Type your question in the corresponding box, select the question type, and then click **Add**.
6. If you selected dropdown as your question type, type an answer to your question and click **Add**.
7. Add more answers if needed.
   Note: The answer ranked as the first one in the list will be the default selection.

To edit an intake set:

1. Select the necessary intake set from the **Edit Intake Set** drop-down menu.
2. Edit a question or an answer, and then click the floppy disk icon next to it to save your changes.
   Note: You can move your questions and answers by clicking up and down arrows. To delete your question or answer, click the cross sign next to it.

Create custom field sets

Custom field sets are used to provide additional information about an epic to help decide if the epic should be approved or rejected. In a custom field set, you can create text fields, which will allow information up to 500 characters in length. You can also create dropdown menus with various selectable options. The fields you create in your custom field set will appear on the Benefits tab of epics.

Note: Individual custom fields can be created for epics and other work items to provide comprehensive details. These fields display within the General tab of a work item's slide-out panel. Create individual custom fields on epics when the fields aren't related to epic approval.

To create a custom field set:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Platform** in the **Settings** section.
3. On the **Portfolio** tab, click **Manage Here** next to **Case Development**.
4. Type the name in the **Custom Field Set Name** box, and then click **Add**.
5. Type your question in the **New Custom Field** box, select the custom field type (dropdown or text), select if the answer to this question is required, and then click **Add**.
6. If you selected dropdown as your question type, type an answer to your question in the **New Option** box and click **Add**.
7. Add more answers if needed.
   Note: The answer ranked as the first one in the list will be the default selection.

To edit a custom field set:

1. Select the necessary custom field set from the **Edit Custom Field Set** drop-down menu.
2. Edit a question or an answer, and then click the floppy disk icon next to it to save your changes.
   Note: You can move your questions and answers by clicking up and down arrows. To delete your question or answer, click the cross sign next to it.

To display a custom field set on all epics within a program:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Programs** in the **Setup** section.
3. Select the program you want to use your custom field set with.
4. In the **Case Development Custom Fields** drop-down menu, select a custom field set to display on epics in the program.
5. Click **Save** to save and apply your changes.

Security settings

To manage security settings:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Platform** in the **Settings** section.
3. Select the **Security** tab.

Use these options to configure security settings for your work:

- **Server Name or IP:** This setting must be configured for navigation from email to the application.
- **Minimum Password Length:** Controls the minimum length of a password. The minimum value is 8 characters.
- **Minimum Password Uppercase:** Controls how many uppercase characters are required in the password. The minimum number of uppercase characters is 1.
- **Minimum Password Numeric Characters:** Controls how many number characters are required in the password. The minimum number of numeric characters is 1.
- **Temporary Links Expiration (Hours):** Controls the time limit during which the links to reset a password or to get a new user account are valid. The minimum value is 1 hour. The maximum and default value is 24 hours.
- **Session Timeout (Minutes):** Controls the session timeout. If you have multiple tabs open and are working in one of them, none of them will time out. If you do not work in any of them for longer than the set timeout and one tab times out, all will time out.
- **Enable Touchscreen:** Turns on or turns off the touchscreen capability.
- **Login Security:** Controls the cookie security level at the login page.
    - **Populate the login page with the last email:** Select this option to store the user's email address in a cookie, allowing the email address field to be populated on the login page. The users have to enter only their password.
    - **Do not populate the login page with the last email:** Select this option not to store the email address in a cookie. The users have to enter their email address and password to sign in to Jira Align.
- **Enable SSO:** Allows the processing of single sign requests when enabled.
- **Disable Manual Sign In:** Controls if the users can access the application by manually signing in through the login page or by using the SSO. The default value is set to **No**. It is always set to **No** if the **Enable SSO** option is set to **No**. You can set the **Disable Manual Sign In** option to Yes only when the **Enable SSO** option is set to **Yes**. When the manual sign in is disabled:
    - Such security settings as **Minimum Password Length**, **Minimum Password Uppercase**, **Minimum Password Numeric Characters**, and **Temporary Links Expiration (Hours)** are disabled.
    - The **Resend Password** link in user properties in **User details** on the people page and in user's profile is disabled.
    - Login page is not available for users.
    - Users created while the manual sign in is disabled do not receive a **New User Setup** email.
- **SAML 2.0 Identity Providers:** Allows you to use a SAML 2.0 Identity Provider to implement SSO. To add your SAML 2.0 Identity Provider, click **Add SAML Provider**, then copy and paste the SAML 2.0 Metadata XML. Under **NameID Lookup By**, select whether you want to use the **Email** or **External ID** field to authenticate Jira Align users by. User's External ID can be set on the **Edit User** page and synchronized through the external connectors. To save the information, click **Save & Close**. The SAML 2.0 Metadata will be validated and the entityID will be shown on the **Configuration** page. You can edit the SAML SSO configuration for the specific Identity Provider by clicking the pencil icon.
- **Sign In URL:** This option is only available when the manual sign in is disabled. Set this value to a URL that you want to direct users to when they try to access Jira Align and are not signed in. Use the token %AC-URL% in the URL to include the Jira Align requested URL in the redirect.
- **Sign Out URL:** Set this value to a URL that you want to direct users to when they click **Sign Out**.
- **Privacy Policy URL:** Set this value to a URL that you want to direct users to for your organization's privacy policy information. The link to this URL will display as the **Privacy Policy link** at the bottom of the **Help** slide-out.

Group settings

To manage group settings:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Platform** in the **Settings** section.
3. Select the **Groups** tab.

Here, you can configure the allocation settings:

- **Allocation Groups:** These are buckets for tracking hours and allocations. Development and quality are specifically used to track burndown charts within sprints.
- **Roles by Allocation Group:** Use this section to map your team level roles, such as Scrum Master, to allocation groups defined in the section above.
- **Task Types By Allocation Group:** Use this section to map your task types, such as development task, to allocation groups defined in the section above.

Dropdown settings

You can configure the dropdown menus to meet your organization needs. To manage dropdown settings:

1. Select the **Settings gear** in the top navigation bar.
2. On the left side of the page, select **Platform** in the **Settings** section.
3. Select the **Dropdowns** tab.

- **Dropdown:** Use this section to customize the following dropdown menus within the application: release vehicle type, feature category, program increment type, strategic initiative, burn hours, defect hours, driver, enterprise hierarchy: category, expense savings, ideazone functionality, investment type, revenue growth, source, split type, story type, and strategic driver.

Reports settings

To configure report settings:

1. Select the **Settings gear** in the top navigation bar.
2. On the left side of the page, select **Platform** in the **Settings** section.
3. Select the **Reports** tab.

The following settings can be configured on this tab:

- **External reports:** Deny or allow the use of external reports in Jira Align. IFrames allow you to view embedded reports and other web content in Jira Align. If you're using the new navigation, external reports can be viewed in the Reports section of the sidebar. If you're using the old navigation, itheycan be viewed from the reports landing in the **External Reports** section of the Reports landing page.
  Notes:
  - Denying the use of external reports will permanently remove any existing approved URLs and/or URL patterns from the Approved URL and URL pattern list. It will also permanently delete any existing external reports.
  - Some sites do not work in an IFrame, including sites that have cross-scripting protection in their headers. For example, Google has

    ```
    x-frame-options: SAMEORIGIN
    x-xss-protection: 1; mode=block
    ```

    If these (or similar) are present in the response from the website, you will not be able to display the website in an external report in Jira Align. Both Google and Jira are two examples of this. For more information on whether a website will work in an IFrame, consult the documentation and support for the website you want to display.

- **Approved URL and URL pattern list:** Add specific URLs and/or URL patterns that can be used in embedded reports. Only URLs and URL patterns included in the list can be displayed as IFrame content.

To add a new URL or URL pattern:

1. Select **Add URL**; a modal displays.
2. In the **iFrame URL** field, enter the URL or URL pattern to add to the Approved URL and URL pattern list.
3. Click **Save** to add the URL or URL pattern as a list item.

To edit an existing URL or URL pattern, select the **pencil**

icon next to the item in the list. If you need to delete a URL or URL pattern, select the **X** icon next to the item. Any existing reports using the deleted URL or URL pattern will be permanently deleted.

Portfolio specific configuration

To configure portfolio-specific settings:

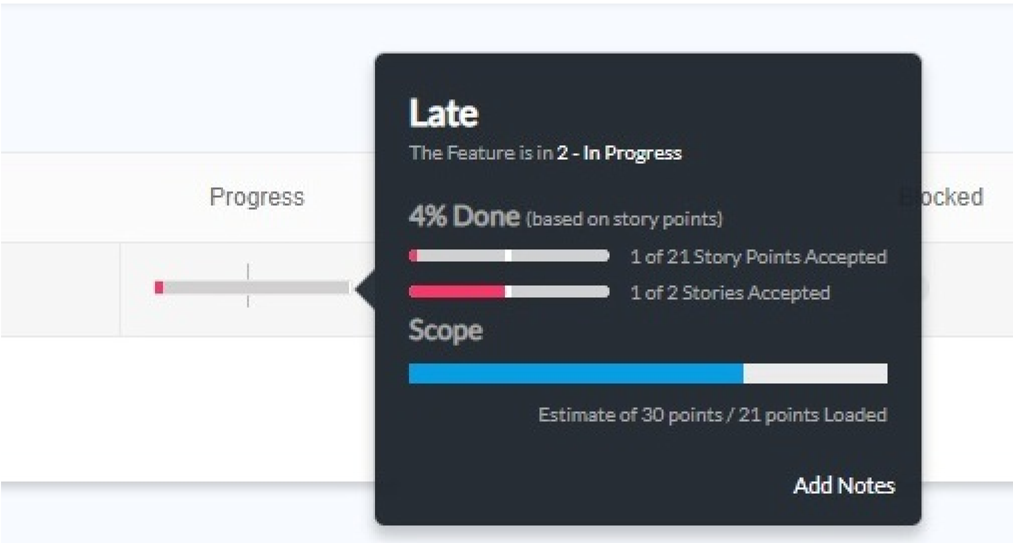
1. Select the **Settings gear**

   in the top navigation bar.
2. On the left side of the page, select **Platform** in the **Settings** section.
3. On any tab, select the **Portfolio Specific Configuration** button and select the portfolio you need. This allows setting each portfolio in a different way.

The following portfolio-specific settings are configurable:

- **Max Task Size In Hours:** Controls the maximum size of a task. Lower task sizes encourage better estimates.
- **Points System:** Controls which scheme of numbers is available to the team when voting on the size of a story. This also controls how WSJF prioritization is calculated.
- **Velocity Range (+ or -):** Controls a built-in metric to show teams what the desired velocity variability should be to drive better predictability.
- **Manage Products:** Turns on or turns off the product option when creating features. This is necessary for organizations that need distinct programs and distinct products. Many organizations can align products and programs, which makes this setting unnecessary.
- **Agile Framework:** Adds a specific language, estimation methods, and menus for known scaled agile frameworks. If you do not use a specific framework, select the hybrid framework.
- **Estimation System:** Controls what method is used to estimate work for epics, capabilities, and features: Team / Member Weeks, T-Shirt, or Points.
- **Costing Method:** Controls if cost is calculated by a PI blended rate or by an individual cost center applicable for each resource.
- **Enable Capabilities:** Turns on or turns off the visibility of capabilities for specific portfolios. Enabling capabilities puts a layer between epics and features. An epic is associated with capabilities and capabilities are associated with features. The direct epic and feature association is no longer possible. Once capabilities are enabled, they cannot be turned off.
- **Capitalization Method:** Controls if epics are capitalized at the task or story level for each feature. The option selected here will override the option selected in the Portfolio settings.
- **Scorecards:** Controls if epics and capabilities can be measured using scorecards. Turns off the **Value** tab on the epic and capability details slide-out panel if both **Scorecards** and **Value Engineering** is set to **No**.
- **Value Engineering:** Controls if epics and capabilities can be measured using value engineering. Turns off the **Value** tab on the epic and capability details slide-out panel if both **Scorecards** and **Value Engineering** is set to **No**.
- **Progress Bar Status:** Controls how your progress bars will be displayed throughout Jira Align. To enable this option, please contact Jira Align support or SA teams. There are three ways to show the progress bar status:
  - **Progress by Story Points** is progress by effort points on an item.
  - **Progress by Count** is progress by child count. If you look at features, for example, it will show the count of stories for them (6 out of 10 stories completed).
  - **Progress by State** is progress by child state. For example, a feature has 10 stories: 6 are accepted, 2 are in progress, and 2 are not started. The progress bar will be 6/10 = 60% complete for the feature.
- **Enable Progress to State Mapping:** Controls if progress bars for stories that don't have tasks will reflect the story state. When this setting is set to **Yes** and a story is accepted, the progress bar fills completely. This setting is primarily intended for teams not using tasks.

- **Progress View Type:** Controls whether you want to see progress dials or progress bars.
- **Progress Alert Threshold:** Top percentages are time elapsed, while the bottom percentages are percent complete of the work items. Percentages can be less than or equal to values. For example, you have a progress bar, the vertical line shows where you are as of today; it shows the time elapsed. If you use story points, the green bar shows all story points completed (accepted), and the gray bar shows all story points that are in progress. If the time elapsed is at 70%, and the completed work did not pass 50%, then the green bar will turn red (late). This way, you can see that something is wrong with this item in red because based on the thresholds it should be over 50% by now. If the completed work goes to 62%, the bar will turn orange (warning).
- **Progress Alert On:** Turns on or turns off the progress alert thresholds for the selected items in such places as, for example, work items' grids, Team Room, Program Room, and Portfolio Room. When enabled, you will see the **Late** (for example as depicted on the image, the time elapsed is at almost 50%, and the completed work did not pass even 5%) or **Warning** (for example, the time elapsed is at 70%, and the completed work is at 62%) alerts when pointing to the progress bars on the selected items.



Set up a program increment cost

Set up projects and allocation to a PI to see the total breakdown cost based on the spent hours.

Note: This functionality is used together with work codes and time entry.

To set up a PI cost:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Report Baseline** in the **Settings** section.
3. Select a program increment to which to allocate costs.
4. In the **Billing Codes** box, select the billing codes to assign to the PI, and then select the right arrow to move them to the **Selected Billing Codes** box.
5. In the **Cost** box, enter a rate for each billing code.
6. Select **Save**.

Assign cost to cost centers

Assign costs to cost centers to see the cost of hours spent on those cost centers. This information is then used calculating costs for a story. For example, you can calculate each story cost based on the development efforts.

Note: For information on how to create cost centers, see the [Create Cost Centers] topic.

To assign cost to a cost center:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Cost Centers** in the **Settings** section.
3. Select the name of the cost center you want to assign a cost to. A details panel will display.
4. In the **Hourly rate ($)** field, type an hourly rate for the cost center, and then click **Save**.

See also

Create cost centers

Basic structure setup

Add cities to the system

You can add cities that your company operates in into Jira Align. Cities and regions are used when setting up Jira Align users to know where they work.

On the **Cities** page, you can use a filter option to narrow down the list of selected criteria displayed in a grid. For example, you may want to filter the list of cities by an ID or a name. Additionally, you can click a column header to sort the list.

To add a city:

1. Select the **Settings gear** in the top navigation bar.
2. On the left side of the page, select **Cities** in the **Setup** section.
3. On the toolbar (top-right of the page), click the **Add City** button.
4. Type the name of the city, and then select the region to which that city belongs.
5. Click **Save & Close**.

Note: If a city is not tied to a region, it shows under any region selected.

Add customers to the system

On the customers page, you can use a filter option to narrow down the list of selected criteria displayed in a grid. For example, you may want to filter the list of customers by an ID or a name. Additionally, you can click a column header to sort the list.

To add a customer:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Customers** in the **Setup** section.
3. On the top-right of the page, click the **Add Customer** button, the **New Customer** slide-out panel displays.
4. In the **Name** box, type the customer's name, and then click **Save & Close**.

Create cost centers

You can use cost centers to track costs associated with time by team, disciplines, regions, products, or other corporate needs. Only users with the appropriate permissions can create cost centers.

To create a cost center:

1. Select the **Settings gear**
   
   in the top navigation bar.
   On the left side of the page, select **Cost Centers** in the **Setup** section.
2. On the toolbar (top-right of the page), click the **Add Cost Center** button.
3. In the corresponding boxes, type a name, an identifier, and a description of the cost center.
4. Select the owner and the region, and then click **Save & Close**.

After creating a cost center, you can then assign a cost to it on the report baseline page.

See also

Assign cost to cost centers

Add countries to the system

In Jira Align, you can add countries to track the delivery of your features or capabilities to them.

On the **Countries** page, you can use a filter option to narrow down the list of selected criteria displayed in a grid. For example, you may want to filter the list of countries by an ID, a name, or a country code. Additionally, you can click a column header to sort the list.

To add a country:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Countries** in the **Setup** section.
3. On the toolbar (top-right of the page), click the **Add Country** button.
4. Type the country code in the corresponding box. After saving a country, you cannot change the country code.
5. In the **Name** box, type the name of a country.
6. In the **ISO 2 Code** and **ISO 3 Code** boxes, type a two-letter or a three-letter combination that stands for a country. For example, the ISO 2 code for France is FR, and the ISO 3 code is FRA.
7. Click **Save**, set the country to inactive if needed, and then click **Save & Close**.

Add a business unit/functional area

A business unit, also referred to as a functional area, is a segment of a company representing a specific *business* function. A business unit can also represent a department or division of an organization, for example, Accounting or Sales.

To add a business unit, follow these steps:

1. Select the **Settings gear**
   
   in the top navigation bar.
   On the left side of the page, select **Functional Areas** in the **Setup** section.
2. On the top-right of the page, click the **Add New** button.
3. In the **Functional Area** box, type the business unit's name.
4. Associate the business unit with a specific program using the **Program** dropdown.
5. Click the **Report Color** field to select a color that will identify the business unit when displayed on various Jira Align reports.
6. Click **Save & Close**; the new business unit displays in the **Functional Areas** grid.

Create enterprise hierarchy

You can build your organization hierarchy from the top level through business units. Organization structures are most commonly used by organizations that have distinct business units or legal entities that require segmentation for resources or funding. If your organization tracks work, creates roadmaps, or manages budgets by business unit, add your organization structures to Jira Align.

Organization structures are used when setting up portfolios.

To create an organization structure:

1. Select the **Settings gear**
   
   in the top navigation bar.
   On the left side of the page, select **Organization Structures** in the **Setup** section.
2. On the toolbar (top-right of the page), click the **Add New** button.
3. In the **Organization Structure** box, type the name of the organization structure, and then click **Save & Close**.

Note: To build the organization hierarchy, add more structures and select the parent organization structure for each of them.

Create portfolios

A portfolio is a distinct line of business that includes its own organizational structure with its own executives, product management, and development teams. Many organizations will only have one portfolio, but larger organizations may have several portfolios, for example, in the case where companies are acquired by a parent company.

Pay attention that deleting a portfolio permanently removes it from the system. Be sure all work items were removed from this portfolio, because they will not be accessible after the portfolio is deleted.

To create a portfolio:

1. Select the **Settings gear**

   in the top navigation bar.
2. On the left side of the page, select **Portfolios** in the **Setup** section.
3. On the toolbar (top-right of the page), click the **Add Portfolio** button.
4. Type your portfolio's title and a short description.
5. If the Private Portfolio feature is enabled in your instance, you may switch-on the **Private Portfolio** toggle to disable access to the portfolio through user impersonation and restrict cross-portfolio work item relationships for objectives and dependencies.
6. Select the parent organization for your portfolio.
7. Type the portfolio team description. The portfolio team is created at the same time the portfolio is created.
8. Select the region for your portfolio.
9. Select if the portfolio is active. Inactive portfolios do not appear in some reports across the application. Programs/teams do not appear for dependencies if a parent portfolio is inactive.
10. Select the scorecard for this portfolio. You can use scorecards to score and rank your epics in a consistent way across the programs and portfolios.
11. Select the intake form for this portfolio. The intake form is used to store additional information about an epic. This is the information your organization wants to collect about every project.
12. Select the case development custom field set for this portfolio. Custom field sets are used to provide additional information about an epic to help decide if the epic should be approved or rejected.
13. Click **Save**.
14. On the **Members** tab, under **Team Members**, select the necessary team members to add to your team. **Note:** Click **Push members to related Program teams** to add all team members to the program teams associated with this portfolio team.
15. Click **Save & Close**.

See also

[Create enterprise hierarchy]

[Create portfolio teams]

[Create scorecards]

[Create intake sets]

[Create custom field sets]

[Manage epics]

Create programs

A program, also called a release train in the Scaled Agile Framework, includes a set of product management and development teams that work from a shared backlog and coordinate team of teams meetings. Teams within a program usually only work on products and projects for their own program, though occasionally might coordinate work with other programs.

Pay attention that deleting a program permanently removes it from the system. Be sure all work items were removed from this program because they will not be accessible after the program is deleted.

To create a program:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Programs** in the **Setup** section.
3. On the toolbar (top-right of the page), click the **Add Program** button.
4. Complete the required fields, and then click **Save & Close**.

Note: Additionally, select **Solution** from the corresponding dropdown. A solution is used to group programs when a multi-program consolidated view is required routinely. For example, if you need to report on Business and Consumer Enablers as a consolidated program, then you may create a solution **Enablers** that is a program of both. Solutions are not permitted to be assigned any work items. These must be assigned to one or more unique programs. Use solutions to filter the reports easily rather than to add every associated child program to get the overall result.

Create solutions

A solution is used to group programs when a multi-program consolidated view is required routinely. For example, if you need to report on Business and Consumer Enablers as a consolidated program, then you may create a solution **Enablers** that is a program of both. Solutions are not permitted to be assigned any work items. These must be assigned to one or more unique programs. Use solutions to filter the reports easily rather than to add every associated child program to get the overall result.

To create a solution:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Programs** in the **Setup** section.
3. On the toolbar (top-right of the page), select the **Add Program** button.
4. Enter a name for your solution, and then select **Yes** from the **Solution** dropdown.
5. From the corresponding dropdown, select a portfolio the solution will be tied to, and then select **Save & Close**.

Next, you need to associate programs with the created solution using the **Solution** dropdown on the Program slide-out panel.

Add geographical regions to the system

Regions are used when setting up Jira Align users and program increments.

On the **Regions** page, you can use a filter option to narrow down the list of selected criteria displayed in a grid. For example, you may want to filter the list of regions by an ID or a name. Additionally, you can select a column header to sort the list.

To add a region:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Regions** in the **Setup** section.
3. On the toolbar (top-right of the page), select the **Add Region** button.
4. Enter the name of the region, and then select **Save & Close**.

Create theme groups

A theme group is a user-defined bucket/category for grouping themes. Themes are grouped into theme groups via the **Theme Group** attribute when creating a new theme (theme groups must be enabled using the **Enable Theme Groups** portfolio setting. Theme groups are primarily used as filters on various reports.

To add a theme group, follow these steps:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Theme Groups** in the **Setup** section.
3. On the top-right of the page, click the **Add Theme Group** button; the New Theme Group panel displays.
4. In the **Theme Group Name** box, enter the new theme group's name.
5. Enter a description of the theme group in the **Description** field.
6. Select the **Parent Goal** for the theme group from the corresponding dropdown.
7. Select **Save & Close**; the new theme group displays in the Theme Group grid.

SSO support

Jira Align SSO support

Jira Align supports Security Assertion Markup Language (SAML) 2.0 Identity Provider-initiated single sign-on (SSO).

About SAML 2.0

Security Assertion Markup Language 2.0 is a version of the SAML standard for exchanging authentication and authorization data between security domains. SAML 2.0 is an XML-based protocol that uses security tokens containing assertions to pass information about a principal (usually an end user) between a SAML authority, that is, an identity provider, and a SAML consumer, that is, a service provider. SAML 2.0 enables web-based authentication and authorization scenarios including cross-domain SSO, which helps reduce the administrative overhead of distributing multiple authentication tokens to the user. You can find more information about SAML 2.0 here and here.

About SSO

Single sign-on is a property of access control of multiple related but independent software systems. With this property, a user logs in with a single ID and password to gain access to a connected system or systems without using different user names or passwords, or in some configurations, seamlessly sign on at each system. You can find more information about SSO here.

SAML and SSO in Jira Align

Jira Align supports SAML 2.0 Identity Provider-initiated SSO. We support multiple Identity Providers, each one is configurable in the Jira Align product through a unique SAML 2.0 Metadata XML. Each Identity Provider's Metadata should contain the certificates required for the Jira Align product to verify SAML XML signatures. In Jira Align, the SAML integration uses the RSA-SHA256 (https://www.w3.org/2001/04/xmldsig-more#rsa-sha256) signing algorithm.

Each Identity Provider can specify the Jira Align user lookup field which will be used to find Jira Align users from the SAML NameID value. Jira Align supports two user lookup fields: the email address and External ID of a Jira Align user. The product requires signing both the SAML response and the assertion. SAML encryption is not supported, as our application requires all traffic over an HTTPS/SSL encrypted protocol. Jira Align does not have a single specific endpoint URL that handles SSO requests, as any page (URL) in the product can be directly authenticated into. However, most customers' Identity Providers are configured to use a default page URL, for example, https://CUSTOMERNAME.jiraalign.com.

Jira Align can be configured to allow manual login when SSO is enabled or to not allow manual login when SSO is enabled. If manual login is not enabled with SSO, Jira Align typically requires the ability to authenticate using the customers' Identity Provider so that members of the Jira Align team can assist customers with successful use of Jira Align.

You can use your company's internal Identity Provider to authenticate into the Jira Align product. Contact your company's Identity Provider administrator to get the SAML 2.0 Metadata to add to Jira Align and to set up your company's Identity Provider for Jira Align.

For identity providers such as [PingFederate](#) (versions below 9.1) and OneLogin, it is possible to sign both the response and assertion, but only when encrypting assertions. Jira Align doesn't support encrypting assertions, so signature should be disabled via SQL command directly on the box.

Sample IdP metadata

Below is a simplified metadata file sample. Your version may vary depending on your IdP:

```
<EntityDescriptor ID="%IDP unique identifier%" entityID="%IDP entity ID
here%" xmlns="urn:oasis:names:tc:SAML:2.0:metadata">
    <IDPSSODescriptor
protocolSupportEnumeration="urn:oasis:names:tc:SAML:2.0:protocol">
        <KeyDescriptor use="signing">
            <KeyInfo xmlns="http://www.w3.org/2000/09/xmldsig#">
                <X509Data>
                    <X509Certificate>%IDP signing cert here%</X509Certificate>
                </X509Data>
            </KeyInfo>
        </KeyDescriptor>
    </IDPSSODescriptor>
</EntityDescriptor>
```

SAML Assertion Condition

Jira Align validates the SAML Assertion Condition time range. The valid range should be a small amount of time before the current time for the **NotBefore** attribute and a small amount of time after the current time for the **NotOnOrAfter** attribute. With typical clock variances and drift for servers across the Internet, a couple minutes on each side of the current time is usually sufficient.

We found that some Identity Providers cannot set the **NotBefore** attribute to a value other than the current time. This typically causes the SAML Assertion to be invalid due to clock time differences between the Identity Provider and Jira Align servers.

To help the customers without the ability to manage the **NotBefore** attribute's time, the Jira Align product will automatically skew the **NotBefore** time to be the same difference from the current time, as the **NotOnOrAfter** time is different from the current time. For example, if the current time and the **NotBefore** time are both the same, and if the **NotOnOrAfter** time is 2 minutes different from the current time, then Jira Align will automatically skew the **NotBefore** time to be 2 minutes before the current time to create a time span that can accommodate click variances and drift for servers connecting across the Internet.

Transitioning an Identity Provider to a new signing certificate

The SAML 2.0 specification allows for the Identity Provider's metadata to contain two signing certificates concurrently. The Identity Provider should be configured for a new signing certificate ahead of the existing signing certificate expiration or transition. The Identity Provider is not expected to start using this newly configured signing, though the new Identity Provider's metadata should be generated so it includes both signing certificates and updated within the SSO configuration section of Jira Align (the service provider). Once these two tasks are completed, the Identity Provider can be scheduled to transition to start using the newly configured signing certificate at a specified date. The specification is designed this way to avoid any downtime by providing the ability to configure all service providers ahead of the Identity Providers transition to use a new signing certificate.

SSO implementation workflow

Workflow

Customer to provide	Jira Align to provide
• Test instance of Identity Provider* (IP-Test) • Production instance of Identity Provider (IP-Prod)	• Test instance of Jira Align (AC-Test) • Production version of Jira Align (AC-Prod)

* The Identity Provider is the Single Sign-On mechanism utilized for the end users at the customer's site. Examples of these solutions are Enterprise Directory, CA SiteMinder, and Microsoft ADFS.

To set up the workflow:

1. Identify an administrator or architect for an Identity Provider.
2. Identity Decision:
   a. Determine a unique identity mechanism to pass to the Jira Align application.
   Note: Descriptions of mechanisms are described in this guide.

3. Set up the test environments:
   a. The Identity Provider administrator enables the Jira Align application within the configuration.
   Note: Both the response and the assertion must be signed.
   b. The Jira Align administrator sets the Identity Provider metadata in the Jira Align administration UI.

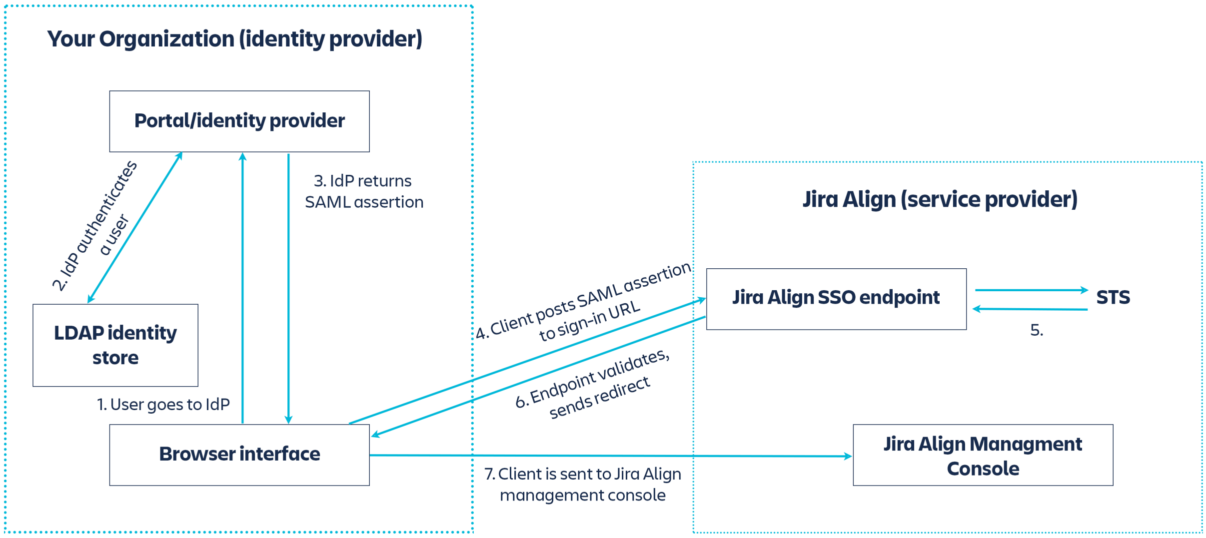
4. Validation of IP-Test to AC-Test
   Note: The AC-Test instance will not have any secure customer data. This instance is for the configuration purposes only.

5. Set up production environments:
   a. The Identity Provider administrator enables the Jira Align application within the configuration.
   b. The Jira Align administrator sets the Identity Provider metadata in the Jira Align administration UI.

6. Validation of test to production (Optional)
   This step depends on the timing of the roll out for Jira Align and testing requirements from the Identity Management team at the customer's site.

7. Validation of IP-Prod to AC-Prod

User-authentication workflow



This diagram illustrates how identity provider-initiated SAML 2.0 SSO works for the users of Jira Align:

1. The user browses to the organization's portal and selects the option to go to Jira Align. In your organization, the portal is typically a function of your identity provider (IdP) that handles the exchange of trust between your organization and Jira Align. For example, in Active Directory Federation Services, the portal URL is: https://*ADFSServiceName*/adfs/ls/IdpInitiatedSignOn.aspx
2. The portal verifies the user's identity in your organization.
3. The IdP portal generates a SAML authentication response that includes assertions that identify the user and include attributes about the user. The portal sends this response to the client browser.
4. The client browser posts the SAML assertion to Jira Align's single sign-on endpoint, for SaaS this is typically https://CUSTOMERNAME.agilecraft.com.
5. Jira Align will validate that both the SAML Response and the SAML assertion are signed and read the value for the **NameID** attribute from the SAML assertion to look up an existing Jira Align user by their email or their **External ID** field. If a matching user is found, the system will log them in. If no matching user is found or if the SAML validation fails, then Jira Align will display an error message with the cause of the failure.

SSO settings

SSO, single sign-on, is a property of access control of multiple related but independent software systems. With this property, you can log in once and gain access to all systems without logging in again at each of them.

To configure the SSO in Jira Align:

1. Select the **Settings gear** in the top navigation bar.
2. On the left side of the page, select **Platform** in the **Settings** section.
3. Select the **Security** tab.

The following SSO settings are configurable:

- **Enable SSO**. Allows the processing of single sign requests when enabled.
- **Disable Manual Sign In**. Controls if the users can access the application by manually signing in through the login page or by using the SSO. The default value is set to **No**. It is always set to **No** if the **Enable SSO** option is set to **No**. You can set the **Disable Manual Sign In** option to **Yes** only when the **Enable SSO** option is set to **Yes**. When the manual sign in is disabled:
  - Such security settings as **Minimum Password Length**, **Minimum Password Uppercase**, **Minimum Password Numeric Characters**, and **Temporary Links Expiration (Hours)** are disabled.
  - The **Resend Password** link in user properties in **Settings** > **People** > **User details** and in user's profile is disabled.
  - Login page is not available for users.
  - Users created while the manual sign in is disabled do not receive a **New User Setup** email.
- **SAML 2.0 Identity Providers**. Allows you to use a SAML 2.0 Identity Provider to implement SSO. To add your SAML 2.0 Identity Provider, click **Add SAML Provider**, then copy and paste the SAML 2.0 Metadata XML. Under **NameID Lookup By**, select whether you want to use the **Email** or **External ID** field to authenticate Jira Align users by. User's External ID can be set on the **Edit User** page and synchronized through the external connectors. To save the information, click **Save & Close**. The SAML 2.0 Metadata will be validated and the entityID will be shown on the **Configuration** page. You can edit the SAML SSO configuration for the specific Identity Provider by clicking the pencil icon.
- **Sign In URL**. This option is only available when the manual sign in is disabled. Set this value to an identity provider-initiated SSO URL that you want to direct users to when they try to access Jira Align and are not signed in.
  Note: We do not support redirects to other Jira Align pages when users are unauthenticated by SSO.
- **Sign Out URL**. Set this value to a URL that you want to direct users to when they click **Sign Out**.

Azure settings

Jira Align requires signing both the SAML response and the assertion. If you use Azure, configure the settings below.

To turn on both a signed response and assertion in Azure:

1. In Azure, go to **All Services** > **Enterprise Applications** > **All applications** > **Single sign-on**.
2. Under **SAML Signing Certificate**, select the **Show advanced certificate signing settings** check box.
3. From the **Signing Option** drop-down menu, select the **Sign SAML response and assertion** option.
4. From the **Signing Algorithm** drop-down menu, select the **SHA-256** option.
5. Click **Save**.

Note: For more details on the Azure settings, refer to the Azure Help Documentation: https://docs.microsoft.com/en-us/azure/active-directory/manage-apps/certificate-signing-options

Support

Migrate Jira Align from on-premise to the cloud

This article provides an overview of the roles and process when migrating Jira Align from an on-premise instance to the cloud.

On this page:

Roles involved

Depending on the method used, one or more individuals and teams may assist with your migration request:

- **Jira Align Enterprise Solutions Specialist (ESS), or Solution Architect (SA):** Assists with coordination between you and Jira Align Support.
- **Jira Align Support**: Intakes and manages your migration request through a submitted support ticket.
- **Your team**: Assists with administration and configuration in Jira Align. Please ensure you have contacts in your organization with administrative privileges ready to perform any requested changes.

Migration steps

To migrate Jira Align, complete the following steps for pre-migration, migration, and post-migration:

Pre-migration

1. Contact your Enterprise Solutions Strategist (ESS), or Solutions Architect (SA) to review your requirements.
2. Submit a ticket to Jira Align Support. You and your ESS or SA should include the following information:
    1. The desired migration timeline.
    2. Confirm that an Amazon Web Services S3 bucket is acceptable for transferring your Jira Align database backup files. This method is preferred, and recommended by support.
    3. If the migration will be to a multi-tenant or dedicated virtual private cloud (VPC).
    4. If there are any SSO connections that will be required.
    5. If you have the on-premise version of Enterprise Insights (EI) installed, and if EI should be provisioned to a multi-tenant or dedicated virtual private cloud (VPC).
    6. If there are any connectors that must be migrated. If so, include network connectivity requirements including, but not limited to:
        1. The version of Jira being used, Cloud or Data Center.
        2. If there is an IP allowlist or mutual TLS for your Jira site. If so, Jira Align Support will need to provide Jira Align IPs and/or the certificate to enable communication between Jira Align and Jira.
    7. The requested instance URL names for Jira Align Cloud. A support engineer can work with you to create these.
    8. Confirm that the license dates, site location (e.g. USA, Frankfurt, Sydney), and user counts will remain the same after migration to the cloud.

Migration

1. Prepare your on-premise instance for backups:
    1. Stop the connector Windows service(s) from the Jira Align on-premise web server.
    2. Deactivate the connector(s) from the Jira Align UI.
    3. Stop the website from the Jira Align on-premise web server.
    4. Stop Internet Information Services (IIS) from the Jira Align on-premise web server.
2. Create a database backup and upload it to an AWS S3 bucket (encrypted) provided by Atlassian.
    1. There is only one database per site that is required: the **[CUSTOMERNAME]** named database that was defined in the on-premise install process.
    2. Native and compressed SQL Server backup files in .bak or .bacpac format are required.
    3. A full database backup file is required.
3. Do not use the on-premise site after the database backup file is generated.
4. The Jira Align infrastructure team will load your database backup file into the Jira Align Cloud instance. We'll let you know once this is complete.

Post-migration

1. Jira Align Support will activate the manual login page for your cloud instance.
2. You'll be asked to log in as a Jira Align Administrator, and validate the following:
    1. User migration
    2. Project migration
    3. Access to all connectors

Migrate Jira Server or Data Center to Jira Cloud

This article provides an overview of Jira Cloud migrations options for Jira Align users. When migrating your connected Jira instance from Server or Data Center to Cloud, there are currently two options, each with different considerations and levels of effort.

On this page:

Roles involved

Depending on the method used, one or more individuals and teams may assist with your migration request:

<table>
<tr><th>Atlassian</th><th>Partner</th><th>Customer</th></tr>
<tr><td>Jira Align Enterprise Solutions Specialist (ESS), or Solution Architect (SA): Assists with coordination between you, Jira Align Support, and Jira Align Engineering.</td><td rowspan="4">Partners: May assist with planning and executing a migration, if your licenses were purchased through a partner.</td><td rowspan="4">Your team: Assists with administration and configuration in Jira and Jira Align. Please ensure you have contacts in your organization ready with administrative privileges for each product ready to perform any requested changes.</td></tr>
<tr><td>Cloud Migrations Manager (CMM): Assists with planning, coordination, and working with members of Atlassian's migration team.</td></tr>
<tr><td>Jira Align Support: Intakes and manages your migration request through a submitted support ticket.</td></tr>
<tr><td>Jira Align Engineering: Assists with scripting when the JCMA Project by project (PbP) migration option is used.</td></tr>
</table>

Migration options

You may choose one of the following methods to migrate your Jira site to the cloud:

1. **Jira Cloud Migration Assistant (JCMA)- Project by project (PbP), also known as "Choose what to migrate"**: Atlassian recommends this method in most situations. Note that for Jira Align users, this method requires some work from your staff and Jira Align teams, as the ID values and custom field names are not preserved when moving a Jira Server / Data Center instance to Jira Cloud. This includes **ProjectID**, **BoardID**, **IssueID**, **SprintID**, and more.
2. **Jira Cloud Migration Assistant (JCMA)- Migrate all data at once (MAO)**: With this method, the underlying ID values are preserved in most cases. Please confirm with your Jira Cloud migrations manager your exact use case specifically if you are migrating to an existing Jira Cloud instance for your organization.

   The option to 'Migrate all data at once' will be discontinued

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   In September 2024, we'll discontinue the migration option to 'Migrate all data at once'. For migrators who are actively using this option, we'll continue to support it and maintain its current functionality until September 2024. For more information on this announcement, read our Community post.

   We recommend that all customers use the 'Choose what to migrate' option. This option is designed to be flexible to meet the unique needs of scaling organizations.
   How to choose what Jira data to migrate

3. **Custom**: APIs and 3rd party apps are available, but will not involve the Cloud Migrations team.

Migrate with the Jira Cloud Migration Assistant (JCMA) - Project by project (PbP)

To migrate using JCMA PbP, complete the following steps for pre-migration, migration, and post-migration:

Pre-migration

1. Contact the Cloud Migrations team, your Enterprise Solutions Strategist (ESS), or Solutions Architect (SA) to review your requirements, and submit a ticket to Jira Align Support. Your CMM, ESS, or SA should include:
    1. The desired migration timeline
    2. A link from the request to the MOVE tickets, to ensure both activities are included in migration tests.
2. Schedule a test environment migration with Jira Align Support to ensure they are available and involved in the required Jira Align backend work.
3. Schedule a production environment migration with Jira Align Support.
4. Set up a new connector for Jira Cloud inside Jira Align. Jira Align Support can assist with the following:
    1. The new connector service for Jira Cloud needs to be enabled by support. Note that the connector remains deactivated at this stage.
    2. Verify that the connector service account is set up on Jira Cloud and has the proper permissions for all projects and boards designated for integration with Jira Align.
    3. Confirm the connector connectivity with Jira Cloud is established. Please refer to this article to learn more about Jira Cloud connectivity. Keep the connector deactivated.
5. Provide the Jira Connector IDs in scope for migration to Jira Align Support, i.e the source (connector pointed to Jira Server / DC) and destination (Jira Cloud connector created in step #4 above).
6. Confirm that Jira user email addresses are not changing as part of the Jira migration. If addresses are changing, please make sure Jira Align emails match with Jira Cloud emails.
7. Deactivate the Jira Connector in Jira Align for the old Jira Server or Data Center connection.

Migration

1. Before the migration is kicked off, provide data from your Jira Server/DC instance, specifically ProjectIDs, BoardIDs, IssueIDs, and StateIDs. Jira Align Support will share SQL queries required for these entities. This data is needed in a CSV format.
2. Begin the migration in Jira.
3. Let Jira Align Support team know once the Jira migration is complete.
4. Jira Align Support will query your Jira Cloud data to gather Jira Cloud ProjectIDs, BoardIDs, IssueIDs, etc.
5. Jira Align support will generate mapping validation files for review and request your sign-off before handing over to the Jira Align engineering team for backend updates
6. Jira Align engineering will perform backend work (backups, updates etc.)
7. Jira Align engineering runs data migration scripts.
8. Jira Align Support runs a script to clear old Jira Align - Jira user mapping.

Post-migration

1. Perform validation steps with test cases provided by Jira Align Support.
2. Activate the newly-created Jira Connector for the Cloud instance.

Migrate with the Jira Cloud Migration Assistant (JCMA) - Migrate all data at once (MAO)

To migrate using JCMA MAO, complete the following steps for pre-migration, migration, and post-migration:

Pre-migration

1. Contact the Cloud Migrations team, your Enterprise Solutions Strategist (ESS), or Solutions Architect (SA) to review your requirements, and submit a ticket to Jira Align Support. Your CMM, ESS, or SA should include:
    1. The desired migration timeline
    2. A link from the request to the MOVE tickets, to ensure both activities are included in migration tests.
2. Schedule a test environment migration with Jira Align Support to ensure they are available and involved in the required Jira Align backend work.
3. Schedule a production environment migration with Jira Align Support.
4. Confirm that Jira user email addresses are not changing as part of the Jira migration. If addresses are changing, please make sure Jira Align emails match with Jira Cloud emails.
5. Deactivate the Jira Connector in scope for migration in Jira Align.
   Note: For the MAO migration approach, we'll be utilizing the existing Jira Server/Data Center connector and will not create an new connector.

Migration

1. Perform the migration in Jira using the MAO method, in coordination with the Jira Migration team.
2. Jira Align Support runs a script to clear old Jira Align - Jira user mapping.

Post-migration

1. Update the Jira Connector connection details in Jira Align.
    1. Update existing connector connection details to point to Jira Cloud. If the original service account is not migrating to Jira Cloud, please plan for a service account with the same permissions on Jira Cloud.
    2. Confirm the connector connectivity is established to Jira Cloud. Please [refer to this article] to learn more about Jira Cloud connectivity.
    3. Confirm configuration settings and update as required.
    4. Confirm and if necessary update State mappings (Global and project-specific) as required
    5. If there are custom fields that are integrated but do not exist in Jira Cloud, they will need to be created in Jira Cloud.
2. Activate the connector.

Things to know

To ensure your migration runs smoothly with any method, please be aware of the following:

- It is important to plan your Jira migration in conjunction with Jira Align. We can proceed with the migration of a Jira Align connector, only once your Jira instance has been successfully migrated to Cloud.
- Preferably, migrations are scheduled with Jira Align teams at least 1-2 months in advance.
- Our teams will try to avoid scheduling migrations during feature release weekends.
- The Jira Connector does not support rich-text when syncing with Jira Cloud. If you are using Jira Data Center and currently syncing rich-text bidirectionally, we recommend using the Jira to Jira Align only sync direction after migration. If you want to sync bidirectionally with Jira Cloud, plain text must be used in work item fields.
- Before performing test migration, it is recommended to perform a test environment refresh from production data for both the systems - Jira Server/DC and Jira Align to closely mimic production environments. If your Jira Align instance is with Atlassian Cloud, please reach out to the Jira Align support team to have it refreshed with production data.

  Note: Please perform a test environment refresh for Jira Align and Jira in the same timeframe, to minimize data mismatches between the two systems.
- When Jira Align Support provides mapping validation files, note the following:
  - Projects: The project(s) listed within the files will not be migrated to the Jira Cloud instance.
  - Issues: The issue(s) listed within the files are likely a result of not running the Jira Deleted issues report in Jira Align, prior to migration. These issues exist in Jira Align, and no longer exist in Jira. A solution to fix these issues is to run the Jira Deleted issues report prior to migration.

Jira Align and Atlassian trust overview

The following is a brief overview of some of the ways we approach Jira Align and Atlassian trust. Click the PDF below to download.

System administration overview

With Jira Align, you can scale agile to the enterprise. Everyone from engineers to executives can use Jira Align to optimize software delivery.

The *Administration Guide* provides you with the basic information on how to configure your environment. It is intended primarily for users with the Super Admin role.

Supported browsers

Jira Align supports the following browsers:

- Google Chrome (latest version)
- Mozilla Firefox (latest version)
- Apple Safari (latest version)
- Microsoft Edge (latest version)

For the best experience, we recommend downloading the newest version of your preferred browser.

Support for Microsoft Internet Explorer 11 was retired in September 2020.

Supported attachments

Currently, Jira Align supports the following attachment types: .gif, .jpg, .png, .csv, .xls, .pdf, .bmp, .doc, .txt, .jpeg, .tiff, .xlsx, .docx, .msg, .ppt, .pptx, .vsd, .vsdx.

The current size limit is 4 MB per file, but you can upload multiple files. So, if a file is too big, it can be split into pieces and uploaded that way.

Release history

The Release History page provides a list of Jira Align releases/versions, including version number and release dates.

To view the release notes for a specific version, simply select the **release name** to be directed to the Jira Align support page. From there, select **Documentation** to view Jira Align documentation, including release notes.

Version information

The **Version** page provides information about the current version of Jira Align and the date of its release. You can also check the license details and view the expiration date.

Set Jira Align license

You need to set the license for Jira Align.

To set the product's license:

1. Select the **Settings gear**
   
   in the top navigation bar.
   On the left side of the page, select **Version** in the **Support** section.
2. Click **Enter License**, paste the license information obtained from the Jira Align Support, and then click **Apply License**.

Note: Once successfully entered, you will see the license details displayed and license warning will no longer appear.

Add announcements

You can add your own announcements and notify people about system updates, company updates, and other. These announcements appear on the login page. If the announcement is inactive, it does not appear on the login page. You can make it inactive by clicking the red cross sign.

To add an announcement:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Announcement** in the **Settings** section.
3. On the **Announcement Settings** page, select the type of an announcement from the **Type** dropdown menu:
   - **Ongoing:** These announcements will display every time a user logs in until they expire.
   - **One-time:** These announcements will only display once to each user.
4. Enter the title of the announcement and the announcement itself in the corresponding boxes.
5. Select a start and end date for the announcement in the corresponding fields.
6. Select **Add Announcement**.

Users and roles

Add users

In Jira Align, you can add users, assign them roles, and add them to the teams.

To add a user:

1. Select the **Settings gear**
   in the top navigation bar.
2. On the left side of the page, select **People** in the **Access Controls** section.
3. Select the **Add User** button.
4. Complete the required fields and optional fields if needed.

    - **User Start** and **End Dates** are used to schedule when a user can have access to Jira Align so you can create a user account in advance, but the account cannot be used until the start date. Access will be granted at midnight (12 A.M.) of the selected date. The start date can be set up to 30 days in the past. You can also set the last day the user can have access to Jira Align and have the account closed on that day automatically. The account is closed at 11:59 P.M. of the selected date, which can be today, one day before today, or any day in the future. If you do not enter a start date when creating the account, the date will automatically be filled with the date the record is created. If you do not enter an end date, the date will automatically be filled with the date the record is deactivated. If the user is automatically deactivated, the end date is set for the day of deactivation.
    - **User Type** defines the user as External (can only submit ideas and enhancements) or Internal (fully functioning role-based users).
    - **External ID** is used for SSO authentication. You can set and manually make changes to a user's External ID as necessary.
    - **Employee ID** is used to tie the employee's ID to other data if your company exports data to other systems. This field is alpha-numeric and supports special characters. This field is available only if you turn it on under in user record settings.
    - For the role definitions, see the Roles section.
    - **Enterprise Hierarchy** allows you to tie users to the location in the enterprise hierarchy they are associated with.
    - **Company** and **Company ID** options can be tied to your internal corporate systems and external data marts. These fields are available only if you turn them on in user record settings.
    - If you do not see the appropriate region, you can add regions on the regions page.
    - If a city is not tied to a region, it shows under any region selected. You can add cities on the citie page.
    - To create cost centers, go to the cost centers page, and then click **Add Cost Center** on the toolbar.
    - **Idea Access** (appears on **Save**) allows you to secure Idea Groups by user ID.

4. Click **Save**.

5. Open the **Teams** tab. Here, you can add the user to teams. Under **Assigned to Teams**, you can view all teams the user is a member of.

6. Click **Save & Close**.

Managing passwords

Add users

You can add users and assign them roles on the people page. To add a user, see the Add users article. After you add a user, the user receives an invitation email (New User Setup) with a temporary password and a link to reset the temporary password.

You can configure the minimum password length, uppercase and numeric characters in Security settings.

Resend invitations

You can resend an invitation email to new users to let them access the application even if their invitation link expired. To resend the invitation email, go to the people page, select the necessary user, and then click the **Resend Invitation** link. This link appears only if the user was created but did not sign in to the application.

You can configure the expiration time of the temporary links in Security settings. The maximum and default value is 24 hours.

Reset passwords

You can reset the user's password on the people page. Select the necessary user, and then click the **Reset User Password** link. If users cannot reset a password by themselves for any reason, you can send them a link to reset their password directly. Copy the link from the **Password Reset Link** box, and then send the link to a user.

Note: The ability to reset passwords will be removed when **Disable Manual Sign In** in Security settings is set to **Yes** as users will only be able to login via SSO.

Locked accounts

You can unlock the users' accounts if they were automatically locked out after a number of incorrect attempts to enter their password. To unlock the account, go to the people page, select the necessary user, and then click the **Unlock** link.

Deactivated accounts

You can deactivate users' accounts if they left the company or for any other security reasons, and you can also activate their accounts.

To activate or deactivate the account, go to the people page, select the necessary user, and then click the **Activate** or **Deactivate** link respectively. After you activated or deactivated a user's profile, the status on the **Edit User** page will change to **Active** or **Inactive** respectively.

You can also activate or deactivate users' accounts by using the import functionality. Go to the people page and select **More Actions** > **Import Users Records**. In the import template, find the **Active User** column and set the **Active** or **Deactivated** status for users.

Export users

The option of exporting users is a convenient way to store all user information in one document. You can also use this option to email or review the user data. The exported file is saved in an Excel spreadsheet.

To export users:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **People** in the **Access Controls** section.
3. Click **Apply Filters**, and then select who you want to export (for example, users of a specific role or region).
4. From the **More Actions** menu, select **Export**.
5. Select the location for the document, and then click **Save**.
   Note: If you do not apply any filters, all items in the grid are exported.

Import users

You can import several users at once to optimize your work. This allows you to make user updates without having to go through the UI.

For importing, use the XML spreadsheet 2003 format template, which you can download from the **User Import** page.

To import users:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **People** in the **Access Controls** section.
3. From the **More Actions** menu, select **Import Users Records**.
4. Click the **Browse** button, select the filled-in document from your computer, and then click **Open**.
5. Click **Import**.

You can also activate or deactivate users' accounts by using the import functionality. In the import template, find the **Active User** column and set the **Active** or **Deactivated** status for users.

Notes:

- The current size limit is 4 MB per file, but you can upload multiple files. So, if a file is too big, it can be split into pieces and imported that way.
- If there are users listed in this file that are not currently in Jira Align, click **Continue** to create those users as part of the import process. If these users are not created as part of the import process, you will create incomplete records. Cancel the import and validate the user names before continuing.
- Users created in Jira Align as part of the import process will not receive an account creation email.

Import template file:

Jira Align system roles

Jira Align comes with a default set of roles that can be configured. The built-in roles are appropriate for the following people in your organization:

- **Super Admin**: Jira Align administrators who can customize configuration and terminology.
- **PMO**: Program managers, members of the PMO, or release train engineers.
- **Executive**: Executives and high-level personnel mainly interested in finances and reporting at a high level.
- **Product Owners**: Product managers, product owners, and business analysts.
- **Team Leads**: Scrum Masters, project managers, architects, and development leads.
- **Team Member**: Developers and QA engineers.
- **Kanban Users** or **Default**: Anyone who wants a Kanban board but does not need the roll up or reporting features.
- **External User**: A user, such as an external customer, who needs access to Jira Align. These users have the option to submit enhancement requests or ideas through the ideas portal.

See also

Add Roles

Copy Roles

Manage Standard Roles

Set system and team roles/permissions

Within Jira Align, there are two application roles: system and team roles. This topic will help you to better understand the difference between them and what rights they have.

Team roles

Team roles have certain responsibilities, such as running standup meetings, accepting stories, or managing sprints. For example, if a story is in the backlog, anyone can work with it. However, after the sprint starts, only certain team members can make changes. The following table provides an overview of the roles with their rights and responsibilities. For a detailed comparison of the permissions associated with each role, see the Assign Team Roles article.

Role	Rights and responsibilities

Analyst	An analyst can update the sprint after it starts and manage the sprint. This role has full control of what to do with a team. Only an analyst and a product owner can accept stories.
Architect	Day-to-day activities: create tasks and stories and enter time for tasks.
Business owner	Business owners can be members of a team for visibility, but they cannot have any allocation of effort towards work. So, for a sprint, their allocation will always be 0%.
Developer	Day-to-day activities: create tasks and stories and enter time for tasks.
Documentation	Day-to-day activities: create tasks and stories and enter time for tasks.
Enterprise architect	Enterprise architects can be members of a team for visibility, but they cannot have any allocation of effort towards work. So, for a sprint, their allocation will always be 0%.
Epic owner	Epic owners can be members of a team for visibility, but they cannot have any allocation of effort towards work. So, for a sprint, their allocation will always be 0%.
Product owner	A product owner can update the sprint after it starts and manage the sprint. This role has full control of what to do with a team. Only an analyst and a product owner can accept stories.
QA lead	A QA lead can run a daily standup meeting, add stories to a sprint, and update the sprint status.
Release train engineer (RTE)	RTEs can be members of a team for visibility, but they cannot have any allocation of effort towards work. So, for a sprint, their allocation will always be 0%.
Scrum Master	A Scrum Master manages the team and the sprint. A Scrum Master can do a number of sprint management activities, such as run a daily standup meeting, add stories to a sprint, update the sprint status, add a user in the middle of the sprint, change and update capacity for users, and other. Scrum Masters can also drop stories but not change the sprint assignment when the current sprint is in progress—a Super Admin can make this change. Alternatively, a Scrum Master can drop a story, and then reassign it to the necessary sprint.
Stakeholder	A stakeholder has the visibility of the work done within the sprint. This role has no action control.
Team coach	A team coach can update the sprint after it starts and manage the sprint.
Tester	Day-to-day activities: create tasks and stories and enter time for tasks.

UX	UX designers can be members of a team for visibility, but they cannot have any allocation of effort towards work. So, for a sprint, their allocation will always be 0%.

System roles

System roles mainly control what you see: menu items, buttons, and other. The following tables list some of the available features for each system role at installation time.

Important: If a user cannot access a page and sees the **You Need More Access To View This Page** message, check the respective permissions for this user's role under **Settings** > **Roles**.

There are three users—Kanban User, Default, and External User—who are omitted in the tables; they have access only to the Kanban board.

Portfolio module

Area	Role					
	Super Admin	PMO	Executives	Product Owners	Team Leads	Team Member
Epics	X	X	X	X	X	
Personas	X	X	X	X	X	X
PI Progress Report	X	X				
Work in Process Report	X	X	X	X	X	X
Investment vs. Actuals Report	X	X	X	X	X	X
Vision	X	X	X	X	X	
Success Criteria	X	X	X	X	X	
Kanban Boards	X	X		X	X	X
Portfolio Room	X	X	X	X	X	
Themes	X	X				
Value Streams	X	X				

Program module

Area	Role					
	Super Admin	PMO	Executives	Product Owners	Team Leads	Team Member
Roadmaps	X	X	X	X	X	X
Backlog	X	X	X	X	X	X
Risks	X	X	X	X	X	X
Dependency	X	X	X	X	X	X
Dependency Map	X	X	X	X	X	X
Features	X	X	X	X	X	X
Work Tree Report	X	X	X	X	X	X
Program Tracking Report	X	X	X	X	X	X
Forecast	X	X	X	X	X	
Program Increments	X	X	X	X	X	
Program Room	X	X	X	X	X	
Program Objective	X	X	X	X		

Team module

Area	Role					
	Super Admin	PMO	Executives	Product Owners	Team Leads	Team Member
Sprint Metrics Report	X	X	X	X	X	X
Sprint Coaching Report	X	X	X	X	X	X
Detailed Sprint Progress Report	X	X	X	X	X	X
Retrospective Summary Report	X	X	X	X	X	X
Sprint capacity	X	X		X	X	X
Sprints	X	X		X	X	X
Team Room	X	X		X	X	X
Assign Tasks	X	X		X	X	X
Stories	X	X		X	X	X
Tasks	X	X		X	X	X
Acceptance Tests	X	X		X	X	X
Team Objective	X	X		X	X	X
Defects	X	X			X	X
Kanban Boards	X				X	X
Team Meetings	X				X	

Integrated users

Integrated users are users created by connectors. Unless otherwise configured, integrated users are assigned the **Default** system role. Integrated user licenses include access to the following functionality; applying any other system role permissions to the default system role will cause the user to be counted as a full user:

Program functionality

- Program board
- Story maps
- Features

Team functionality

- Team room
- Team objectives
- Impediments
- Team meetings (Estimation, sprint planning, daily standup, sprint review, sprint retrospective)
- Backlog
- Kanban boards (backlog kanban views only, not custom kanban boards)
- Stories
- Defects
- Tasks
- Teams
- Sprints

Reports

- Burndowns
- Sprint metrics (M1)
- Sprint health
- Sprint coaching
- Detailed sprint progress
- Sprint status
- Sprint capacity
- Team room reports

Assign team roles

Jira Align's team roles are designed to reflect a user's permissions at a team level. Users can be a member of multiple teams at a time, but their responsibilities on each team may differ. Assign users team roles for each team they're on to allow them to manage the team's sprints as needed.

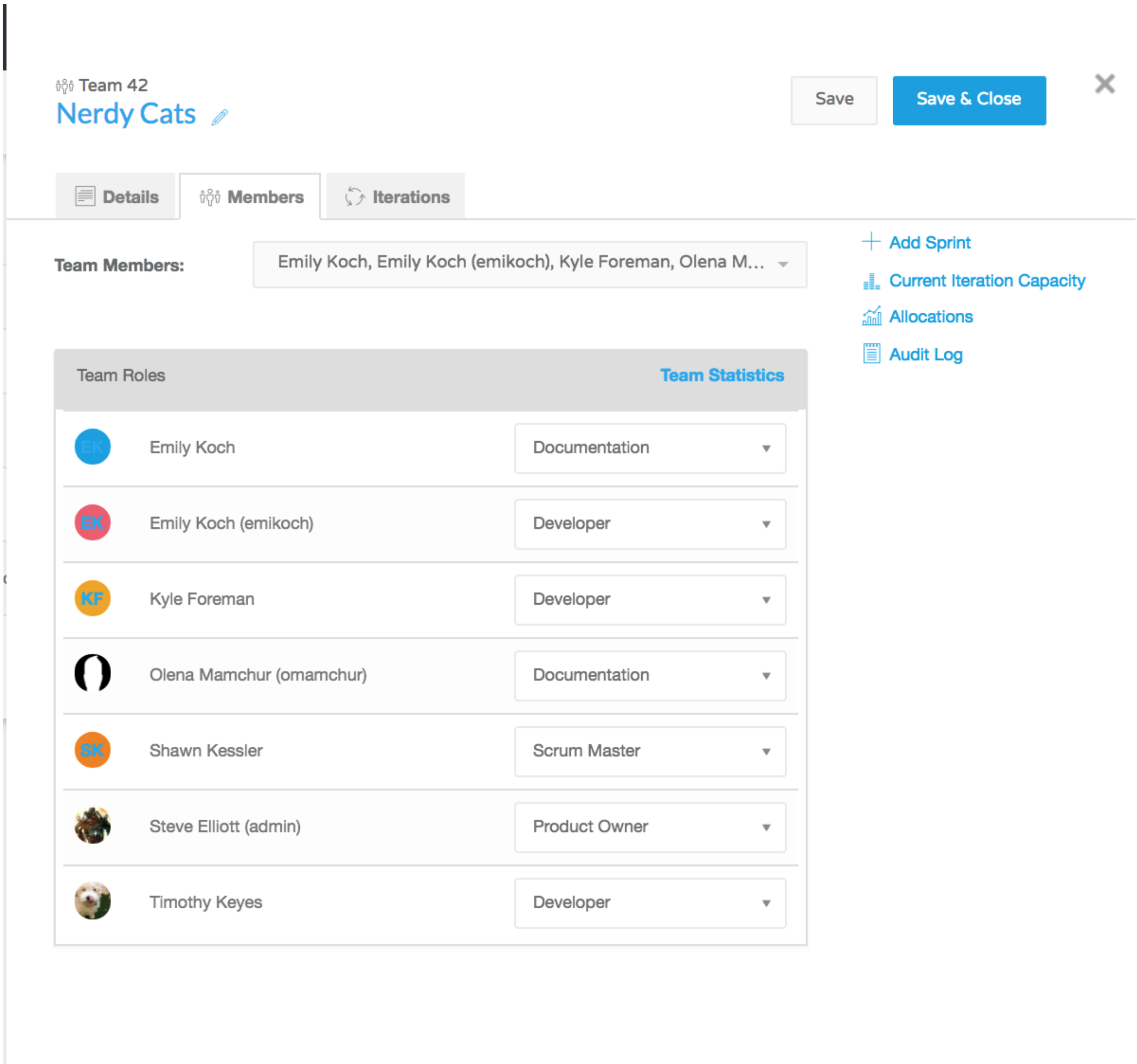
Note: When you add a user to a team, a role is not automatically assigned.

Assign team roles on the teams page:

1. Select **Teams** in the top navigation bar and select any team.
2. On the sidebar, select **More items** in the list of options.
3. Select **Teams**; the teams page displays.

To add a member to a team and assign them a team role:

1. On the teams page, select the team you would like to assign members to. The team slide-out menu appears with detailed information about the team.
2. Select the **Members** tab to assign members to the team.
3. In the **Team Member** drop-down, select the name of the Jira Align user you'd like to add to the team. You can select multiple users in the drop down as desired.
4. Click outside the drop down to close it. The selected members are assigned to the team and appear in the **Team Roles** panel.



6. On the **Team Roles** panel, each team member is listed with a drop-down menu where you can select their role on the team.

   Each user's team role reflects the member's responsibilities for their specific team, such as running standup meetings, accepting stories, or managing sprints. For example, while a story is in the backlog, anyone can work with it. However, after the sprint starts, only certain team members can make changes. The responsibilities associated with each role are pre-set and cannot be user configured.

Depending on the type of team selected, each user can be assigned one role per team from certain types of roles:

- Portfolio Teams: Business Owner, Enterprise Architect, or Epic Owner.

  Note: Portfolio team members who are assigned these roles are automatically granted access to view work for all program and Agile and Kanban teams associated with the portfolio with the same rights as a stakeholder. However, they aren't automatically listed in the program or Agile team member lists.

- Program Teams: Release Train Engineer*, Stakeholder, or Team of Team.

  Note: Program team members who are associated with these roles are automatically granted access to view work for all Agile and Kanban teams associated with the program with the same rights as a stakeholder. However, they aren't automatically listed in the Agile team member lists.

- Agile and Kanban Teams: Analyst, Architect, Business Owner*, Developer, Documentation, Enterprise Owner*, Epic Owner*, Product Owner, Release Train Engineer*, QA Lead, Scrum Master, Stakeholder, Team Coach, Tester, or UX.

  Note: Agile and Kanban team members are automatically granted access to view work for all Agile and Kanban teams associated with the team's program. However, they are they aren't automatically listed in other Agile or Kanban team member lists so that different permission levels can be set for each team a user is a member of.

* Users assigned this role prior to version 10.30 will appear on the Agile or Kanban team member list with the role, and will have their associated permissions. However, after changing the user's role to another role, the role cannot be re-selected as an Agile or Kanban team member and must be reassigned on a portfolio or program team.

To learn more about the permissions and abilities associated with each role, select a role below:

- Analyst
- Architect
- Business Owner
- Developer
- Documentation
- Enterprise Architect
- Epic Owner
- Product Owner
- QA Lead
- Release Train Engineer (RTE)
- Scrum Master
- Stakeholder
- Team Coach
- Tester
- UX

Analyst

Analysts can:

- View work for all agile teams in a program
- Assign a story to a sprint (Agile teams only)
- Change a story's sprint assignment before a sprint is in progress (Agile teams only)
- Change a story's sprint assignment during an in-progress sprint (Agile teams only)
- Drop stories from not started sprints (Agile teams only)
- Drop stories from in-progress sprints (Agile teams only)
- Copy stories
- Split stories
- Reassign stories to another program during in-progress sprints (Agile teams only)
- Merge stories
- Delete stories during not started sprints (Agile teams only)*
- Delete stories during in-progress (unlocked) sprints (Agile teams only)**
- Be assigned task allocation and defect allocation
- Accept stories
- Create tasks
- Enter time on tasks***
- Attend team meetings
- Create acceptance criteria before a sprint is in progress (Agile teams only)
- Create acceptance criteria during in-progress (unlocked) sprints (Agile teams only)
- Create acceptance criteria during locked sprints (Agile teams only)
- Pass/fail acceptance criteria
- Automate acceptance criteria

* Stories created from a split cannot be deleted by an analyst.
** The story's owner, designated in the **Assigned** field, can delete a story that has not been created from a split during an unlocked, in-progress sprint, so long as the permissions associated with their system role allow it.
*** Tasks must be assigned to the user.

Architect

Architects can:

- View work for all agile teams in a program
- Change a story's sprint assignment before a sprint is in progress (Agile teams only)
- Copy stories
- Merge stories
- Delete stories during not started sprints (Agile teams only)*
- Delete stories during in-progress (unlocked) sprints (Agile teams only)**
- Be assigned task allocation and defect allocation
- Create tasks
- Enter time on tasks***
- Attend team meetings
- Create acceptance criteria before a sprint is in progress (Agile teams only)
- Create acceptance criteria during in-progress (unlocked) sprints (Agile teams only)
- Pass/fail acceptance criteria
- Automate acceptance criteria

* Stories created from a split cannot be deleted by an architect.
** The story's owner, designated in the **Assigned** field, can delete a story that has not been created from a split during an unlocked, in-progress sprint, so long as the permissions associated with their system role allow it.
*** Tasks must be assigned to the user.

Business Owner

Users assigned this role prior to version 10.30 will appear on the Agile team member list with this role, and will have their associated permissions. However, after changing a member's role to another role, the role cannot be re-selected as an Agile team member and must be reassigned on a portfolio team.

Business owners can:

- View work for all agile teams in a program
- Change a story's sprint assignment before a sprint is in progress (Agile teams only)
- Copy stories
- Merge stories
- Delete stories from not started sprints (Agile teams only)*
- Create tasks
- Enter time on tasks**
- Attend team meetings
- Create acceptance criteria before a sprint is in progress (Agile teams only)

* Stories created from a split cannot be deleted by a business owner.
** Tasks must be assigned to the user.

Developer

Developers can:

- View work for all Agile teams in a program
- Change a story's sprint assignment before a sprint is in progress (Agile teams only)
- Copy stories
- Merge stories
- Delete stories from not started sprints (Agile teams only)*
- Delete stories from in-progress (unlocked) sprints (Agile teams only)**
- Be assigned task allocation and defect allocation
- Create tasks
- Enter time on tasks***
- Attend team meetings
- Create acceptance criteria before a sprint is in progress (Agile teams only)
- Create acceptance criteria during in-progress (unlocked) sprints (Agile teams only)
- Pass/fail acceptance criteria
- Automate acceptance criteria

* Stories created from a split cannot be deleted by a developer.
** The story's owner, designated in the **Assigned** field, can delete a story that has not been created from a split during an unlocked, in-progress sprint, so long as the permissions associated with their system role allow it.
*** Tasks must be assigned to the user.

Documentation

Documentation can:

- View work for all agile teams in a program
- Change a story’s sprint assignment before a sprint is in progress (Agile teams only)
- Copy stories
- Merge stories
- Delete stories from not started sprints (Agile teams only)*
- Delete stories from in-progress (unlocked) sprints (Agile teams only)**
- Be assigned task allocation and defect allocation
- Create tasks
- Enter time on tasks***
- Attend team meetings
- Create acceptance criteria before a sprint is in progress (Agile teams only)
- Create acceptance criteria during in-progress (unlocked) sprints (Agile teams only)

* Stories created from a split cannot be deleted by documentation.
** The story's owner, designated in the **Assigned** field, can delete a story that has not been created from a split during an unlocked, in-progress sprint, so long as the permissions associated with their system role allow it.
*** Tasks must be assigned to the user.

Enterprise Architect

Users assigned this role prior to version 10.30 will appear on the Agile team member list with this role, and will have their associated permissions. However, after changing a member’s role to another role, the role cannot be re-selected as an Agile team member and must be reassigned on a portfolio team.

Enterprise Architects can:

- View work for all agile teams in a program
- Change a story’s sprint assignment before a sprint is in progress (Agile teams only)
- Copy stories
- Merge stories
- Delete stories from not started sprints (Agile teams only)*
- Create tasks
- Enter time on tasks**
- Attend team meetings
- Create acceptance criteria before a sprint is in progress (Agile teams only)

* Stories created from a split cannot be deleted by an enterprise architect.
** Tasks must be assigned to the user.

Epic Owner

Users assigned this role prior to version 10.30 will appear on the Agile team member list with this role, and will have their associated permissions. However, after changing a member’s role to another role, the role cannot be re-selected as an Agile team member and must be reassigned on a portfolio team.

Epic Owners can:

- View work for all Agile teams in a program
- Change a story's sprint assignment before a sprint is in progress (Agile teams only)
- Copy stories
- Merge stories
- Delete stories from not started sprints (Agile teams only)*
- Create tasks
- Enter time on tasks**
- Attend team meetings
- Create acceptance criteria before a sprint is in progress (Agile teams only)

* Stories created from a split cannot be deleted by an epic owner.
** Tasks must be assigned to the user.

Product Owner

Product Owners can:

- View work for all agile teams in a program
- Assign a story to a sprint (Agile teams only)
- Change a story's sprint assignment before a sprint is in progress (Agile teams only)
- Change a story's feature assignment when a sprint is not completed (Agile teams only)*
- Drop stories from not started sprints (Agile teams only)
- Drop stories from in-progress sprints (Agile teams only)
- Copy stories
- Split stories
- Reassign stories to another program during in-progress sprints
- Merge stories
- Delete stories during not started sprints (Agile teams only)**
- Delete stories during in-progress (unlocked) sprints (Agile teams only)***
- Accept stories
- Create tasks
- Enter time on tasks****
- Attend team meetings
- Update an **In Development** sprint state
- Create acceptance criteria before a sprint is in progress (Agile teams only)
- Create acceptance criteria during in-progress (unlocked) sprints (Agile teams only)
- Pass/fail acceptance criteria
- Automate acceptance criteria

* After a sprint is completed, only users with the Super Admin system role can change a story's feature assignment.
**Stories created from a split cannot be deleted by a product owner.
*** The story's owner, designated in the **Assigned** field, can delete a story that has not been created from a split during an unlocked, in-progress sprint, so long as the permissions associated with their system role allow it.
**** Tasks must be assigned to the user.

QA Lead

QA Leads can:

- View work for all agile teams in a program
- Change a story’s sprint assignment before a sprint is in progress (Agile teams only)
- Copy stories
- Merge stories
- Delete stories from not started sprints (Agile teams only)*
- Delete stories from in-progress (unlocked) sprints (Agile teams only)**
- Be assigned task allocation and defect allocation
- Create tasks
- Enter time on tasks***
- Attend team meetings
- Create acceptance criteria before a sprint is in progress (Agile teams only)
- Create acceptance criteria during in-progress (unlocked) sprints (Agile teams only)
- Pass/fail acceptance criteria
- Automate acceptance criteria

* Stories created from a split cannot be deleted by a QA lead.
** The story's owner, designated in the **Assigned** field, can delete a story that has not been created from a split during an unlocked, in-progress sprint, so long as the permissions associated with their system role allow it.
*** Tasks must be assigned to the user.

Release Train Engineer (RTE)

RTEs can:

- View work for all agile teams in a program
- Change a story’s sprint assignment before a sprint is in progress (Agile teams only)
- Copy stories
- Merge stories
- Delete stories from not started sprints (Agile teams only)*
- Create tasks
- Enter time on tasks**
- Attend team meetings
- Create acceptance criteria before a sprint is in progress (Agile teams only)

* Stories created from a split cannot be deleted by a RTE.
** Tasks must be assigned to the user.

Scrum Master

Scrum Masters can:

- View work for all Agile teams in a program
- Change a story’s sprint assignment before a sprint is in progress (Agile teams only)
- Change a story’s sprint assignment during an in-progress sprint (Agile teams only)
- Change a story’s feature assignment when a sprint is not completed (Agile teams only)*
- Drop stories from not started sprints (Agile teams only)
- Drop stories from in-progress sprints (Agile teams only)
- Copy stories
- Split stories
- Reassign stories to another program during in-progress sprints
- Merge stories
- Delete stories during not started sprints (Agile teams only)**
- Delete stories during in-progress (unlocked) sprints (Agile teams only)***
- Be assigned task allocation and defect allocation
- Create tasks
- Enter time on tasks****
- Attend team meetings
- Update an **In Development** sprint state (Agile teams only)
- Create acceptance criteria before a sprint is in progress (Agile teams only)
- Create acceptance criteria during in-progress (unlocked) sprints (Agile teams only)
- Create acceptance criteria during locked sprints (Agile teams only)
- Pass/fail acceptance criteria
- Automate acceptance criteria

*After a sprint is completed, only users with the Super Admin system role can change a story’s feature assignment.
** Stories created from a split cannot be deleted by a scrum master.
*** The story's owner, designated in the **Assigned** field, can delete a story that has not been created from a split during an unlocked, in-progress sprint, so long as the permissions associated with their system role allow it.
**** Tasks must be assigned to the user.

Stakeholders

Stakeholders can:

- View work for all agile teams in a program
- Change a story’s sprint assignment before a sprint is in progress (Agile teams only)
- Copy stories
- Merge stories
- Delete stories from not started sprints (Agile teams only)*
- Create tasks
- Enter time on tasks**
- Attend team meetings
- Create acceptance criteria before a sprint is in progress (Agile teams only)

* Stories created from a split cannot be deleted by a stakeholder.
** Tasks must be assigned to the user.

Team Coach

Team Coaches can:

- View work for all Agile teams in a program
- Change a story’s sprint assignment before a sprint is in progress (Agile teams only)
- Change a story’s sprint assignment during an in-progress sprint (Agile teams only)
- Change a story’s feature assignment when a sprint is not completed (Agile teams only)*
- Drop stories from not started sprints (Agile teams only)
- Drop stories from in-progress sprints (Agile teams only)
- Copy stories
- Split stories
- Reassign stories to another program during in-progress sprints (Agile teams only)
- Merge stories
- Delete stories during not started sprints (Agile teams only)
- Delete stories during in-progress (unlocked) sprints (Agile teams only)**
- Delete stories during locked sprints (Agile teams only)
- Create tasks
- Enter time on tasks***
- Attend team meetings
- Update an **In Development** sprint state (Agile teams only)
- Create acceptance criteria before a sprint is in progress (Agile teams only)
- Create acceptance criteria during in-progress (unlocked) sprints (Agile teams only)
- Create acceptance criteria during locked sprints (Agile teams only)
- Pass/fail acceptance criteria
- Automate acceptance criteria

* After a sprint is completed, only users with the Super Admin system role can change a story’s feature assignment.
** The story's owner, designated in the **Assigned** field, can delete a story that has not been created from a split during an unlocked, in-progress sprint, so long as the permissions associated with their system role allow it.
*** Tasks must be assigned to the user.

Tester

Testers can:

- View work for all Agile teams in a program
- Change a story’s sprint assignment before a sprint is in progress (Agile teams only)
- Copy stories
- Merge stories
- Delete stories from not started sprints (Agile teams only)*
- Delete stories from in-progress (unlocked) sprints (Agile teams only)**
- Be assigned task allocation and defect allocation
- Create tasks
- Enter time on tasks***
- Attend team meetings
- Create acceptance criteria before a sprint is in progress (Agile teams only)
- Create acceptance criteria during in-progress (unlocked) sprints (Agile teams only)

* Stories created from a split cannot be deleted by a tester.
** The story's owner, designated in the **Assigned** field, can delete a story that has not been created from a split during an unlocked, in-progress sprint, so long as the permissions associated with their system role allow it.
*** Tasks must be assigned to the user.

UX

UX can:

- View work for all Agile teams in a program
- Change a story's sprint assignment before a sprint is in progress (Agile teams only)
- Copy stories
- Merge stories
- Delete stories from not started sprints (Agile teams only)*
- Delete stories from in-progress (unlocked) sprints (Agile teams only)**
- Be assigned task allocation and defect allocation
- Create tasks
- Enter time on tasks***
- Attend team meetings
- Create acceptance criteria before a sprint is in progress (Agile teams only)
- Create acceptance criteria during in-progress (unlocked) sprints (Agile teams only)
- Pass/fail acceptance criteria
- Automate acceptance criteria

* Stories created from a split cannot be deleted by UX.

** The story's owner, designated in the **Assigned** field, can delete a story that has not been created from a split during an unlocked, in-progress sprint, so long as the permissions associated with their system role allow it.
*** Tasks must be assigned to the user.
Notes:

- While the rights and responsibilities for each team role cannot be configured, an individual user's responsibilities may be limited based on their Jira Align system role, regardless of their team role assignment. For example, if a user is assigned the product owner team role, but cannot accept stories as a part of their system role, they won't be able to accept stories for the team.

  Likewise, with the exception of users assigned the Super Admin system role, users who are not assigned to a team won't be able to perform the responsibilities listed above for the team.
- If a team member impersonates another team member with another role that has reduced responsibilities, the impersonating user will be able to execute the responsibility as though they had their original role with the larger responsibilities. For example, if a user with the product owner role impersonates a stakeholder on the same team, they'd still be able to see the option to change a story's sprint assignment while a sprint is in progress as though they were a product owner.

Additional role options

You can use **Additional Options** to manage the roles. The Permissions option is described in the table below.

Permissions	**Description**
Add Acceptance Criteria Constraints	Add and disable acceptance criteria constraints for epics, features, and stories (a constraint applies to all objects of that type in the selected program increment and program).
Add Agile Objects	Add themes, epics, features, stories, tasks, defects, risks, objectives, goals, and success criteria (any non-administration related object in the system).
Admin Manage Sprints	Add, edit, and delete sprints.
Admin Manage Teams	Add, edit, and delete teams.
Allow User to access the Jira Deleted Issue Report	Allow a user to run the Jira Deleted Issue Report.
Allow User to delete time entry	Allow a user to delete their time entry on a task.
Allow User to edit Feature Jira Project Keys (Multiple)	Allow the selection of multiple Jira projects for a feature.
Change Dependency Commit In Progress	Allow to mark a dependency that is committed back to not committed.
Complete Enhancement Requests	Mark ideas and enhancement requests complete in ideation.
Create/Edit Feedback Groups	Add and edit groups.
Delete Agile Objects	Delete themes, epics, features, stories, tasks, defects, risks, objectives, goals, and success criteria (any non-administration related object in the system).
Edit Time Sheets	Edit time sheets.

Feedback Administrator	Manage feeds.
Import Stories/Tasks/Features	Use the import functionality.
Manage Agile Objects (Admin)	Add and edit objects in administration settings, such as people and roles (any administration related object in the system).
Manage Blog	Manage blogs.
Manage Code Reviews	Modify the code review settings.
Manage Configuration	Edit configuration settings in **Settings** > **Platform**.
Manage Cost Centers	Add, edit, and delete project costing (cost centers) in administration settings.
Manage HotFixes	Add, edit, and delete product fixes.
Manage NewsLetters	Manage newsletters.
Manage Roles	Add, edit, and copy roles.
Manage Story Mappings	Add, edit, and delete story maps.
Manage Surveys	Add, edit, and delete assessments.
Manage Theme Allocations	Allow management of theme allocations.
Manage Users	Add, edit, lock, unlock, and import users.
Manage WorkFlow	Set up workflow rules for different objects (email notifications).
Merge Stories	Merge stories.

Super Admin system role

A user with a Super Admin role has special access to the following sections:

- Set the Super Admin role for other users.
  Note: Non-Super Admins can remove the Super Admin role from users.
- View and edit all Kanban boards in the system.
- View and edit all brainstorming boards in the system.
- View all data regardless of Super Admin team membership on any grid in the system and in any drop-down menu (epics, features, stories, and others).
- Save terminology changes. If you are not a Super Admin, the **Save** button does not appear.

Manage system roles

With Jira Align, you can assign people specific roles and security permissions. You can use default roles, or you can create and copy custom roles to meet your needs. Administrators can manage roles in Jira Align. You can select what permissions the roles should have, and you can also delete the roles you do not need anymore.

System roles are applied to all users within Jira Align and drive user's permissions throughout the system.

To manage a role:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Roles** in the **Access Controls** section.
3. Under **Jira Align Roles**, from the drop-down menu, select the role you want to change.
4. Turn on those levels of the application you want the role to have permissions to.
   Note: Some page toggles appear in multiple hierarchy levels. Switching one of these toggles on or off will affect user permissions in all of the hierarchy levels the toggle appears in.
5. Click the plus sign of the level you chose, and then turn on the specific areas of that level the role should have access to.
6. Click **Save**.

To delete a role:

1. From the drop-down menu, select the role you want to delete.
2. Click **Delete**.
3. Click **Yes, delete it!** in the confirmation message.

Note: You cannot delete the default system roles.

Add system roles

There is a set of built-in roles in Jira Align, but you can also create custom roles depending on your company's policies.

To add a role:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Roles** in the **Access Controls** section.
3. Under **Add New Role**, in the **Role Name** box, type a name for your new role.
4. Select **Add Role**. The role is added under the **Jira Align Roles** section, with an empty list of permissions.
5. Find the added role, and then turn on the levels you want the role to have permission to.
6. Click the plus sign of the level you chose, and then turn on the specific areas of that level the role should have access to.
7. Click **Save**.

Copy system roles

In Jira Align, you can create a role based on the other role by copying it. Then, you can configure it.

To copy a role:

1. Select the **Settings gear**
   
   in the top navigation bar.
2. On the left side of the page, select **Roles** in the **Access Controls** section.
3. Under **Copy Role**, from the **Existing Role** drop-down menu, select the role you want to copy.
4. In the **New Name** box, type the name of your new role.
5. Click **Copy Role**. The role is added under the **Jira Align Roles** section, with the same list of permissions as the original role.
6. Find the added role, and then turn on the levels you want the role to have permissions to.
7. Click the plus sign of the level you chose, and then turn on the specific areas of that level the role should have access to.
8. Click **Save**.

