



Jira Service Management for HR teams

Delivering better HR service
experiences from day one

Jira Service Management for HR teams

Enabling service for all

As organizations build out Enterprise Service Management practices, many Jira Admins land in a role less reflective of a technologist, and more that of an advisor to other teams across the business, like HR. Building strong service management practices requires collaboration and coordination across functions.

In this presentation, we'll share:

- An overview of how Jira Service Management can support common HR service management needs
- Examples of HR service management success stories – and best practices to help your team follow in their footsteps, and maximize your investment in Jira Service Management

Why teams build HR service on Jira Service Management



Quick setup

Out-of-the-box HR templates, pre-made workflows, and common request types help your HR team get their services up and running, faster. With no-code/low-code editing capabilities, HR can self-serve customization of dynamic forms, automations, knowledge base management, virtual agent, and more.



One less tool

Bring all of your service delivery workflows under one, consolidated roof to cut costs and simplify service management across the business. With highly flexible projects built on a shared platform, make it easier to connect with cross-functional teams and volley requests across the company.



Unified experience

Invest in employee experience by building a central watering hole that can answer questions across the business. By bringing multiple service desks into one place—like IT, HR, and other business teams—employees are able to get the help they need, faster, without having to search through endless tools and documentation hubs.

The Atlassian approach to HR service management

Autonomous employees

Help employees request and get help quickly with centralized help for better employee experiences.

A single self-serve knowledge base deflects questions and helps employees route their asks, while AI-powered capabilities like virtual agent help triage and answer common requests 24/7.

Aligned teams

Empower every team to be a “service” team by making it easy to spin up and maintain their own services in an IT-regulated ecosystem.

Customizable advanced forms, no-code/low-code automation capabilities, and more make it easy for HR teams to take ownership of their services in close partnership with IT.



Managing HR service delivery with Atlassian

Better employee experience

From onboarding to off boarding, make it easy for employees to get the resources they need, quickly.

More productive teams

Automate complex repeat workflows, and leverage self-serve knowledge bases and the AI-powered virtual agent to deflect common employee requests.

Sharper cross-functional workflows

Bring teams like HR, Finance, and Legal on to the same service delivery platform to better route requests, and connect workflows across multiple teams.

Need-to-know case handling

Granular request permissions let you customize your approach to issue security, and keep private cases private.

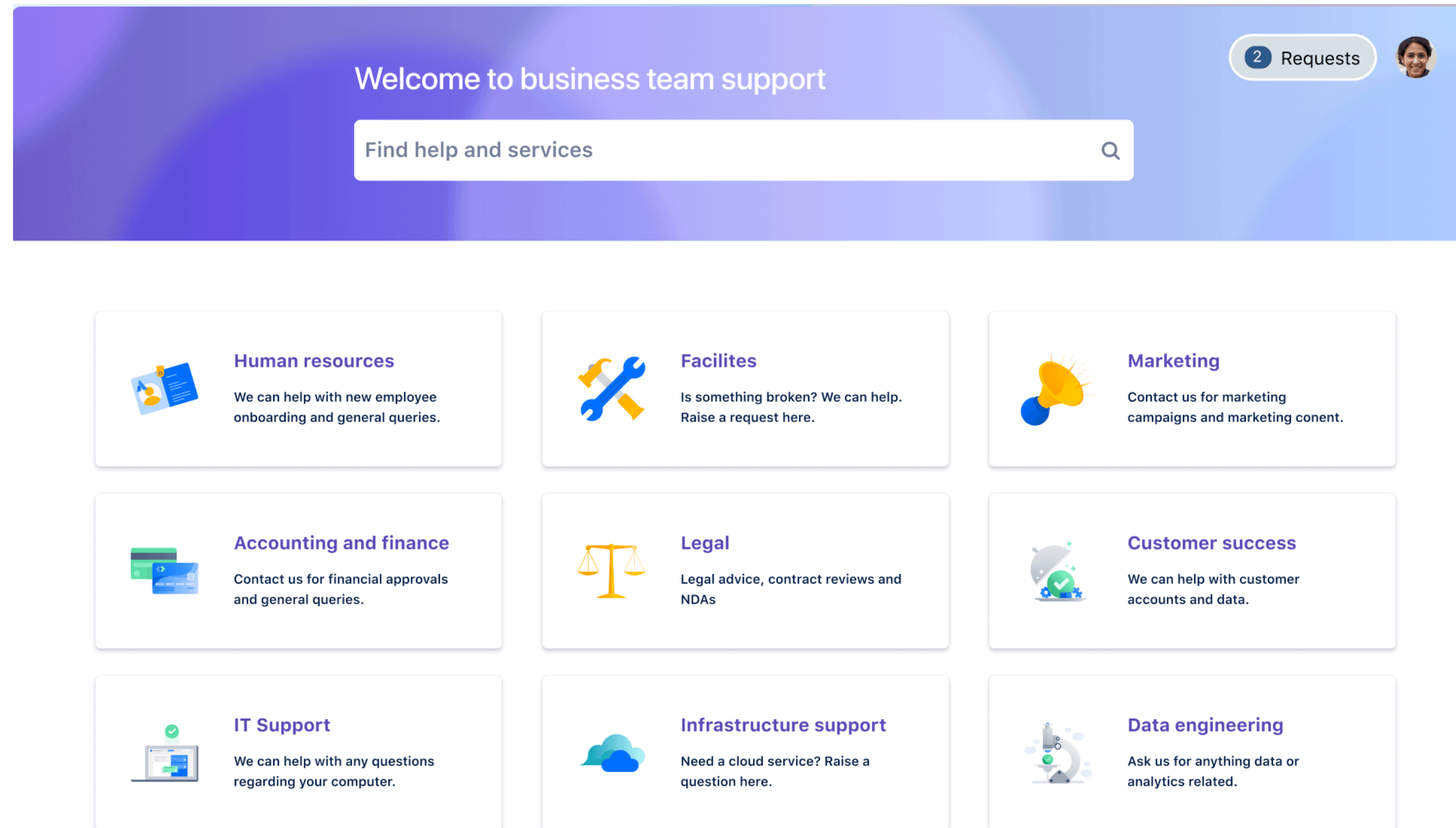
Better employee experience

Flexible intake

Take in employee requests through email, Microsoft Teams, Slack, or web form—wherever they prefer to work—knowing every request will be populated to a central project.

Centralized knowledge

Pool company-wide knowledge into a shared knowledge base that surfaces relevant information to deflect requests, and help guide the remainder to the right team.



More productive teams

AI-powered virtual agent

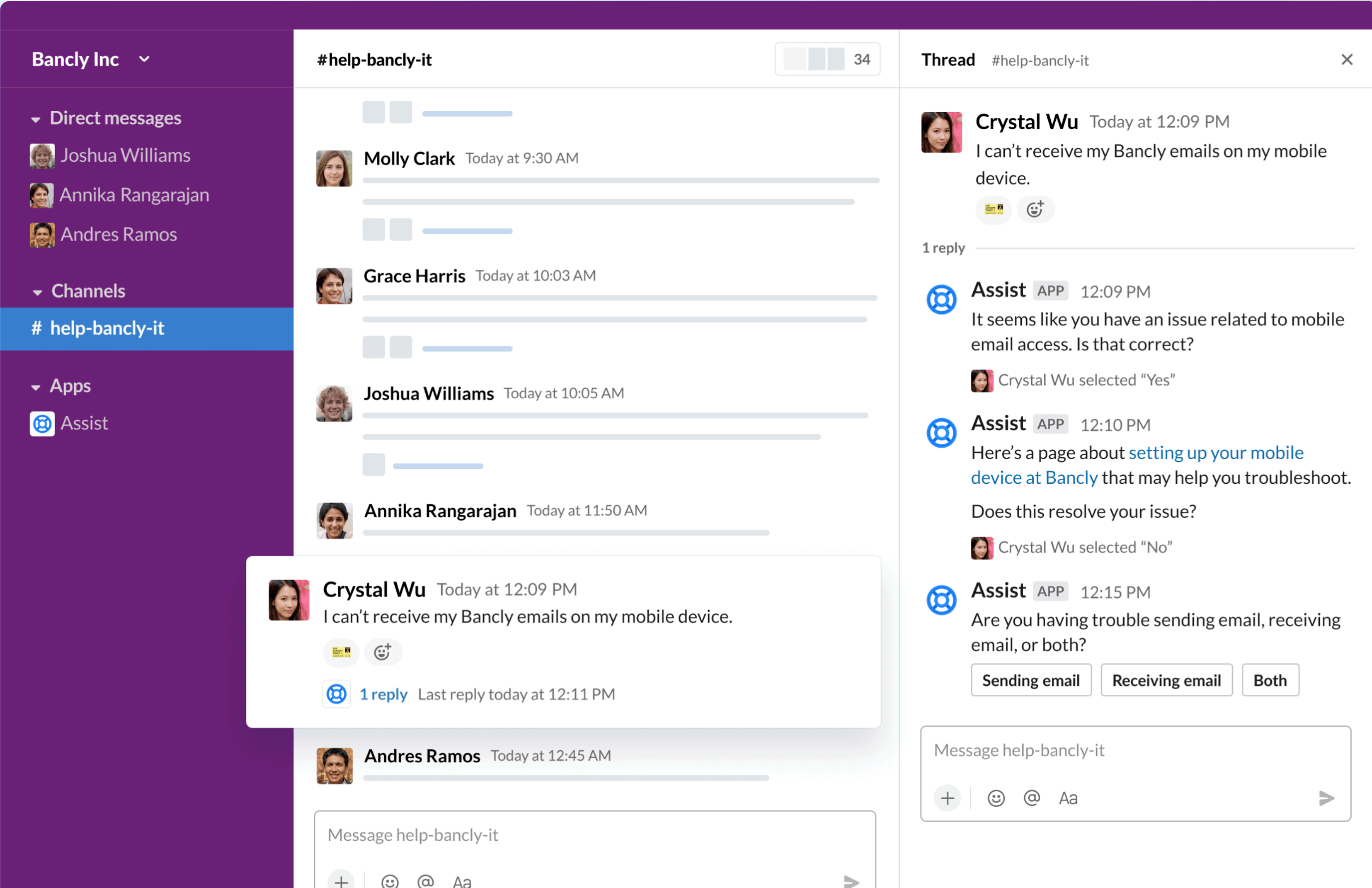
Get employees answers faster, and deflect repetitive questions quickly with help from an AI assistant.

Dynamic, flexible forms

Use a drag-and-drop builder to build forms with conditional logic, tailoring each set of intake questions to the employee’s unique case.

Performance reporting

Capture and analyze data on the health of your service desk, like details on your team’s workload.



Sharper cross-functional workflows

Automation for common workflows

Route tickets to the right team for quicker resolution, or automate repeatable motions at scale, like onboarding a new employee cohort.

Accessible context

Bring in related and interdependent requests with linked issues on each request. Enable agents to quickly understand how a request fits into automated workflows, and click into related requests for more information on related issues.

Projects / Human Resources / Project settings

Onboarding or off-boarding employee: notify assignee when due date is approaching

Rule detailsTurn on ruleReturn to templates

When: Scheduled

 Searches with:
duedate >= now() AND duedate <= 1d AND
statusCategory != Done AND assignee != null
every 2 Hours

Then: Send email

 Assignee
Issue {{issue.key}} is due soon

+ Add component



Onboarding or off-boarding employee: notify assignee when due date is approaching

TEMPLATE

Rule details

Required fields are marked with an asterisk *

Name*

Onboarding or off-boarding employee: notify assignee

Description

This is a good rule for HR teams to use when onboarding or off-boarding a staff member. When the due date of an issue is less than 1 day, an email will be sent to the assignee every 2 hours to remind them.

Scope

 Human Resources

Scope can only be modified in the [global administration](#).

Owner*

 Alana Grant

The owner will receive emails when the rule fails.

Need-to-know case handling

Project-level permissions

Create blanket rules for how users across your organization can view and interact with your HR services project—like who can create and comment on issues.

Issue security controls

For sensitive cases, go a level deeper by controlling who can and can't view information on an issue—by-issue basis.

Projects / HR Services / Project settings

Permission helper Actions

Jira Service Management Permission Scheme for Project HSI

Project permissions define who can access a project and what they can do (create and comment on issues, for example). Access to individual issues is defined in [issue security](#).

This project is using the scheme: Jira Service Management Permission Scheme for Project HSI. To change project permissions, use the **Actions** menu to choose a different scheme or modify the current scheme. [Learn more](#)

Note: Permission schemes may be inherited from the parent project.

Project Permissions

Permission
Administer Projects Ability to administer a project in Jira.
Browse Projects Ability to browse projects and the issues within.
Manage sprints Ability to manage sprints.
Service Project Agent Allows users to interact with customer service agents.
View aggregated data NEW Users with this permission will have access to view combined and summarized project data, regardless of their individual permissions. Learn more .

Users / Groups / Project Roles

Project Role (Administrators)
Project Role (atlassian-addons-project-access)
Project Role (Administrators)
Project Role (atlassian-addons-project-access)
Project Role (Service Desk Team)
Service Project Customer - Portal Access
Project Role (atlassian-addons-project-access)
Project Role (Administrators)
Project Role (atlassian-addons-project-access)
Project Role (Service Desk Team)
Project Role (Administrators)
Project Role (atlassian-addons-project-access)
Project Role (Service Desk Team)
Service Project Customer - Portal Access

Permission helper

Discover why a user does or does not have certain permissions...

User

Begin typing to find a user, leave blank for Anonymous user

Issue

Begin typing to find an issue

Permission

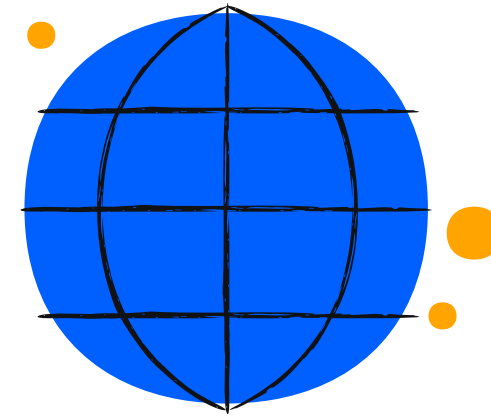
Browse Projects

Begin typing to find a permission or press down to see all

Submit

Close

Plug into your existing tool stack



Employee hubs

Connect to the internal hubs your employees rely on, like Confluence, to create a smooth journey from needing help to finding it.



HCM & analytics tools

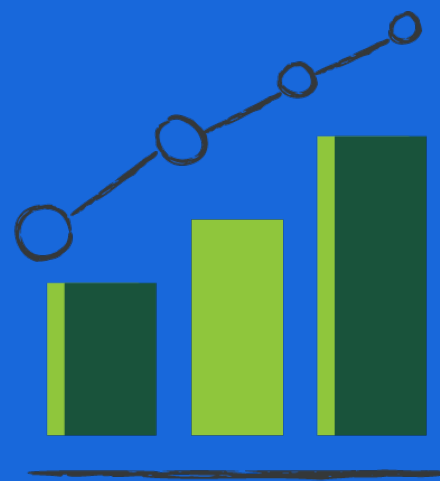
Pull in context from Human Capital Management (HCM) tools like Workday, or integrate with analytics tools to speed up service delivery and improve employee experience.



...and more

Use our robust Marketplace to find integrations that suit your unique needs, or lean on iPaaS connectors like Workato to build custom workflows that span multiple tools.

Benefits of Jira Service Management



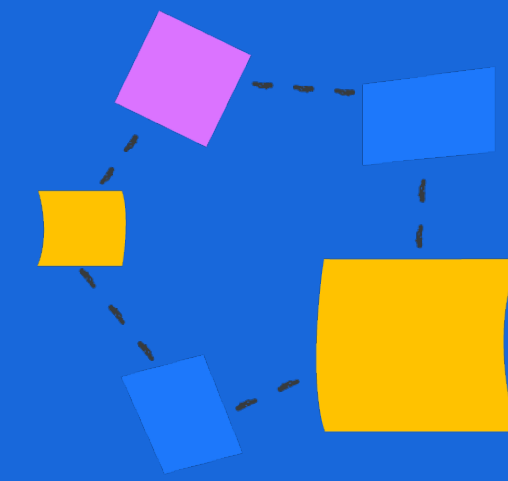
Better service desk productivity

Jira Service Management customers saw a 3-year benefit of \$1.4M in improved service desk productivity.



Stronger end-user productivity

Customers also saw a \$407K improvement in end user productivity over 3 years, and saw improved end-user satisfaction.



Improved cross-functional alignment

Enhanced reporting and cross-team visibility into workflows and team statuses enables alignment.

“ My motto is ‘If you want your process to be visible, you need to put it in Jira Service Management because we have the platform for it.’”

RAZAN NECHIFOR
JIRA GLOBAL TEAM LEADER, EDENRED

Edenred

10,000+

employees served using
Jira Service Management

1,000+

agents across IT and
non-IT teams

60+

service projects, centralized
in one cloud instance

[SEE FULL STORY](#)

“Who can view HR information is heavily controlled, and there’s a high level of security measures in place too. It’s only because of those strict features that we felt comfortable putting this kind of information in Jira Service Management.”

JEFF LAI
INTERNAL INFRASTRUCTURE, CANVA



5,000

tickets processed
annually with Jira
Service Management

150+

hours per month
saved with automation

[SEE FULL STORY](#)

Best practices for bringing Jira Service Management to your HR team

Jira Service Management's intuitive, highly customizable HR service management functionality helps HR teams deliver exceptional service, and great employee experiences.

While each company is unique, these best practices will help you build a foundation for HR service delivery that you can then tailor and customize to your specific needs.

Goals for success

1. Build it right the first time
2. Reduce future overhead
3. Design it well so people want to use it
4. Help people get their work done quickly and effectively

How to navigate a successful implementation process

01

**Discover & understand
business requirements**

02

**Map requirements to Jira
Service Management
configurations**

03

**Implement in
Jira Service
Management**

Align on what you need

Questions for managers in HR

- What's the HR team's mission?
- What are your business processes today?
- What do you need to be able to do in Jira Service Management?
- Who needs access?
- What types of things do you need to track and report on?
- What security needs do we need to consider?
- What other tools do you use?

Questions for end-users in HR

- What are the different asks you perform in a typical day?
- What is your process for those tasks?
- Is your work part of a larger process within the company?
- Where do you start, and where do you hand work off to other people?
- How long do these tasks typically take?
- What sort of data do you need to collect to perform these tasks?
- How can you tell when something is done?
- Do you need to provide reports on your work? What on, to whom, and how often?



Map out your requirements

1. Configure Jira Service Management to meet your business requirements and suit your users
2. Make fields, forms, statuses, and screens intuitive and easy to understand
3. Keep workflows simple
4. Set permissions that balance how your teams work and security requirements
5. Automate as much as possible

STEP 3: IMPLEMENT IN JIRA SERVICE MANAGEMENT

Follow HR implementation best practices

Get a leg up with premade templates & workflows

Start with premade templates, workflows, and request types to get HR teams up and running, then tailor it to your company's unique needs.

Establish a self-serve knowledge base

Help employees answer their own requests with answers to common, related questions, which get surfaced when employees begin to submit a request.

Lean into automation

Take full advantage of Jira Service Management's no-code/low-code automation to build custom flows that minimize repetitive tasks.

Get familiar with reporting & satisfaction feedback

Understand how your new services are performing, and make sure to configure customer satisfaction settings to collect help seeker feedback.

Lay foundations for confidentiality

In addition to the service desks you need for more general HR services—like payroll, or onboarding—we recommend setting up a dedicated service desk for sensitive requests.

More resources

[HR getting started guide](#)

Get up & running quickly with this tactical walkthrough for setting up HR services in Jira Service Management.

[Atlassian's HR service solution](#)

Get inspiration for how to customize your own services with this example Jira Service Management build from Atlassian's own HR teams.

[HR service management template](#)

Start your HR service project with out-of-the-box request types and workflows, built directly into a ready-made template.

[The Forrester Wave™: Enterprise Service Management, Q4 2023](#)

Learn more about the Enterprise Service Management landscape and how Jira Service Management stacks up.



