MockCert

Study guide | Atlassian | ACP-120

Atlassian Certified Jira Administrator for Cloud

Notes for every domain of the Atlassian Certified Jira Administrator for Cloud exam, organized by the official exam guide's domains and weights.

By MockCert about 89 min read Updated November 13, 2026

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Domain 1 | 28% of the exam | 15 min read

Access, Permissions, Security

Overview

This domain is about 28% of the exam, roughly 17 of its 60 questions.

Every point below comes from Atlassian's official documentation; each section lists its sources.

Determine appropriate administrator privileges

Start here

THINK FIRST

How do you tell whether a task needs an org admin, a Jira admin or a space admin?

Why it matters: Questions describe an admin task and ask which admin type, or which permission, is the least needed to do it.

A Jira admin is anyone with the Administer Jira global permission. A space admin holds Administer Spaces for one space and handles that space's everyday details. Selecting or editing the space's schemes needs a Jira admin.

Key terms

Term	Meaning
Jira admin	A user with the Administer Jira global permission, needed to configure spaces.
Space admin	A user with the space-specific Administer Spaces permission, not necessarily Administer Jira.
Organization admin	An organization-level admin who can see space titles, but not content, in audit logs.
Space owner	Usually the space administrator; set to the space's creator by default.
Site admin	Another admin role that, like a Jira admin, can edit space keys and archive or restore both space types.

Three admin types

Each admin type reaches a different level of Jira. Match the task to the narrowest admin who can do it.

What each admin type can and cannot do

Admin type	Example actions	Cannot do
Organization admin	See space titles in audit logs and security alerts; see hidden spaces	See space content in audit logs or alerts
Jira admin	Create company-managed spaces; restore or delete spaces in trash	View a space they created for an app they cannot access
Space admin	Edit name, description, avatar, URL, lead and role membership	Select or edit the space's schemes

What space admins can do

Space admins edit their space's everyday details. Without Administer Jira, they can still define components and versions. They can only view schemes such as the notification and permission schemes.

EXAM TRAP

A space admin cannot switch the space to another permission scheme. They can view schemes, but selecting or editing one needs a Jira admin.

Who can create spaces

Company-managed spaces need Administer Jira. Team-managed spaces need the Create team-managed spaces global permission, which Jira admins control. Only Jira admins can create custom space templates or spaces with a shared configuration.

EXAM TRAP

Create team-managed spaces does not let a user create company-managed spaces. Those still need the Administer Jira permission.

Keys and categories

A space key change needs an organization, site or Jira admin. The same three can delete a previous space key. Changing a space's category requires the Administer Jira global permission.

Archive and trash

Space admins can archive or trash team-managed spaces only. Jira and site admins can archive and restore both space types. Moving a space to trash needs Administer Jira or Administer Spaces. Restoring from trash or deleting from it needs Administer Jira.

EXAM TRAP

Administer Spaces is not enough to restore a space from trash. Restoring and permanently deleting both need Administer Jira.

Granting yourself app access

An admin can grant themselves app access while creating a space. With a template for an app you cannot access, a checkbox appears. Ticking it adds you to the app's default group, and you count toward that license.

Key takeaways

- A space admin holds Administer Spaces, but not necessarily Administer Jira.
- Space admins can view, but not select or edit, their space's schemes.
- Only organization, site and Jira admins can edit or delete a space key.
- Restoring or permanently deleting a space in trash needs Administer Jira.

Sources: Configure spaces | Atlassian Support (opens in a new tab) · Create and edit a space | Atlassian Support (opens in a new tab) · Edit a space's details | Jira Cloud | Atlassian Support (opens in a new tab) · Create a new space | Jira Cloud | Atlassian Support (opens in a new tab) · Edit a space's details | Atlassian Support (opens in a new tab) · Archive a space | Atlassian Support (opens in a new tab) · Hide a space | Atlassian Support (opens in a new tab) · Restore a space from trash | Atlassian Support (opens in a new tab)

Configure global permissions

Start here

THINK FIRST

Which global permission would you grant, and to which group, for each site-wide task?

Why it matters: Questions describe a site-wide task a user cannot do and ask which global permission, granted to which group, fixes it.

Global permissions cover actions across the whole Jira site, not one space. You grant them to groups, so membership decides who holds them. Some, such as Make bulk changes, still need the matching space permissions too.

Key terms

Term	Meaning
Global permission	A permission that applies across the entire Jira site rather than to one space.
Group	A set of users who need the same permissions or restrictions.
Jira admin	Any user who holds the Administer Jira global permission.
Anyone	A grantee option that lets every user who accesses the site perform the action.

Granting and revoking

Grant global permissions from the Global permissions page. Open Settings, then System, then Global permissions. Use the Grant Permission section at the bottom, pick a group or user, and select Add. To revoke, select Delete under the group name.

EXAM TRAP

Choosing Anyone does not keep a permission inside one group. Any user who accesses your site can then perform the related action.

What each permission allows

Learn each global permission together with its limit. Each row pairs what a permission lets users do with the condition or limit that comes with it.

Common global permissions and their limits

Permission	Lets users	Watch out
Administer Jira	Create any space and edit schemes for fields, permissions and notifications	Cannot manage or add users, import or export data, or edit system email settings
Create team-managed spaces	Create team-managed spaces	Company-managed spaces need Administer Jira
Make bulk changes	Edit, move, delete or transition many work items at once	Still needs the matching space permissions
Browse users and groups	See all user names in user pickers and @mentions	Without it, only users with Browse spaces in that space show
Share dashboards and filters	Share dashboards and filters with other users	Only when they have permission to view them
Manage group filter subscriptions	Create and delete group filter subscriptions	Covers group subscriptions, not sharing

Becoming a Jira admin

Org and site admins must join jira-administrators to get Administer Jira. Holding Administer Jira also lets a user log in at any time, regardless of access restrictions.

EXAM TRAP

Administer Jira is not full user administration. It cannot manage existing users, add new users, or import and export data.

Empty user pickers

Empty user pickers point to a missing Browse users and groups. Withholding this permission is also a common way to limit information when you share spaces widely. Users then see only people with Browse

spaces in the space they view.

Guests and global permissions

Guests receive no global permissions in Jira. A guest is an external stakeholder who collaborates for free, with limited access to a single space. Guests are free up to **5** per paid user. Paid users and guests together cannot exceed the site's user limit.

Key takeaways

- Global permissions apply site-wide and are granted to groups.
- Create team-managed spaces allows team-managed spaces only; company-managed spaces need Administer Jira.
- Administer Jira cannot manage users, import or export data, or edit system email settings.
- Empty user picker fields are fixed by granting Browse users and groups.

Sources: Define who can access your Jira site using Permissions | Atlassian Support (opens in a new tab) · What are global permissions, and what do they control? | Atlassian Support (opens in a new tab) · Manage groups | Atlassian Support (opens in a new tab) · View, grant, revoke global permissions in Jira | Atlassian Support (opens in a new tab) · Troubleshoot permissions configurations | Atlassian Support (opens in a new tab) · Guest permissions in Jira | Atlassian Support (opens in a new tab) · Manage permissions in Jira Cloud | Atlassian Support (opens in a new tab)

Configure project permissions

Start here

THINK FIRST

How does controlling who can do what differ between a team-managed space and a company-managed space?

Why it matters: Questions describe who needs access to a space and ask which access level, role, group or permission setting gives it.

Team-managed spaces control access on their own Access page, through an access level plus roles unique to the space. Company-managed spaces use a permission scheme, and only a Jira admin can update it.

Key terms

Term	Meaning
Team-managed space	A space whose configuration, roles and custom fields are its own, never shared with other spaces.
Access level	A team-managed setting (Open, Limited or Private) that decides what everyone on the site can do.
Space role	A named set of permissions, unique to one team-managed space, given to people or groups.

Term	Meaning
Permission scheme	The set of permissions that controls access to a company-managed space.
Global permission	A site-wide permission, such as Administer Jira or Create team-managed spaces.

Two ways to manage access

Team-managed spaces use roles; company-managed spaces use permission schemes. Administration is the main thing that sets the two types apart. A team-managed space keeps its configuration to itself, so a change there never affects another space.

Team-managed and company-managed access compared

Feature	Team-managed	Company-managed
Where access is set	Roles on the space's Access page	A permission scheme
Configuration	Not shared with any other space	Can be shared with other spaces
Custom fields	Bound to that one space	Usually shared across many spaces

EXAM TRAP

Looking for a permission scheme in a team-managed space is a common slip. Its access lives on the Access page, as roles unique to that space.

Access levels set the baseline

The access level decides what everyone on the site can do. Roles you assign then add permissions on top of it. They never override the access level, and one person can hold several roles.

What each access level gives people on the site

Feature	Open	Limited	Private
What site users can do	View, create and edit work items	View and comment, but not edit or create	Nothing; they can't even see the space
Role behind it	Member	Viewer	Access only for Jira admins and people you add

EXAM TRAP

Giving someone the Viewer role in an Open space does not restrict them. Assigned roles add to the Member role they already inherit from the access level.

The default roles

Administrator, Member and Viewer come with every team-managed space. You can't edit or delete them, but you can duplicate one as a starting point for a new role. Some permissions also need app access to Jira, and only a site admin grants it.

Member and Viewer compared

Feature	Member	Viewer
What they can do	Create, edit, comment on and transition work items	Search and view work items, and little else
App access	Needed to get the full benefit of the role	Not needed; any registered user can have it

EXAM TRAP

Need a narrower version of a default role? Editing it is not possible, so duplicate it and build the new role from the copy.

Roles for people or groups

A role can go to individual people or to whole groups. A site-wide group that holds a role gives access to all of its members. On a site's default Jira group, `jira-users-{site}`, every member gets the users project role. That role sees issues not protected by a security level and can create issues.

EXAM TRAP

Removing a person from the Access page does not always end their access. Check with your Jira admin that no site-wide group still grants it.

What Jira admins always control

Jira admins can always reach a team-managed space's settings. A Jira admin is anyone with the Administer Jira global permission. Space names are always visible to them, so keep confidential terms out of names. In company-managed spaces, only a Jira admin can update the permission scheme.

EXAM TRAP

Private does not hide a space from Jira admins. It limits the space to Jira admins and the people or agents you add.

Global permissions and plans

A global permission decides who may create team-managed spaces. Out of the box, a software space gives end users the Create team-managed spaces global permission. So by default, anyone with Jira product access can create a team-managed software space. Jira admins restrict it by choosing which groups are granted that permission.

EXAM TRAP

Roles are not editable on every plan. On the Free plan you can't edit space permissions or roles, and no Free plan allows work-level security.

Permissions inside workflow rules

A workflow rule can check a permission before a transition runs. Require Create work items to move from Start to To do, and Close work items to move from In progress to Done. Require Assign work items to move from To do to In progress. Adding or removing these rules needs the Administrator role and the Administer spaces permission.

EXAM TRAP

Take care when a transition rule limits moves to one role. If you remove that role, your team may have trouble moving work items through the workflow.

Key takeaways

- Team-managed access is set on the Access page; company-managed access comes from a permission scheme.
- Open gives site users the Member role, Limited gives the Viewer role, and Private hides the space from them.
- Assigned roles add to the access level's role and never override it.
- Default roles can't be edited or deleted, only duplicated into new roles.
- After removing a person, check that no site-wide group with a role still grants them access.

Sources: Manage how people and agents access your team-managed space | Jira Cloud | Atlassian Support (opens in a new tab) · Add people to team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Manage and administer team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Migrate between team-managed and company-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · How do work types differ based on space type? | Jira Cloud | Atlassian Support (opens in a new tab) · Create and edit team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Learn how company-managed and team-managed spaces differ | Jira Cloud | Atlassian Support (opens in a new tab) · Understand default groups | Atlassian Support (opens in a new tab)

Configure issue-level security

Start here

THINK FIRST

How would you keep sensitive work in a team-managed space visible only to the people who need it?

Why it matters: Questions describe sensitive work and ask how to limit who can see it, and what happens when roles change.

Jira access works in layers, from the whole organization down to a single work item. In a team-managed space, one of these layers lets you restrict a type of work so only chosen roles can see it.

Key terms

Term	Meaning
Space role	A role unique to one team-managed space. You assign people and groups to it to control their access.
Access level	The general access and role that anyone logged in to the site gets in a team-managed space.
Work type restriction	A team-managed setting that lets only chosen roles see new work items of one type.
Restrict any work item	A permission that lets a role change one work item's restriction while viewing it.

Access in layers

Admins own access at organization, product, space and work item level. Exam questions often turn on how these layers depend on each other. Think of product access, global permissions, space permissions, workflow conditions and work item security together.

Team-managed access basics

The Access page holds every permission for a team-managed space. The access level gives every logged-in site user a general role. Roles you add on the Access page grant extra permissions on top of that level; they never replace it. Jira admins can always reach the space's settings.

EXAM TRAP

Removing a person from the space may not end their access. They can still get in through a site-wide group that holds a role there.

Why restrict a work type

Restrict a work type when the work holds sensitive data. Some teams handle personally identifiable information (PII) or sensitive financial data. A restriction limits that type of work to specific roles in the space.

Setting the restriction

Space settings, then Work types, then the lock icon. Select the work type and choose the lock icon at its top-right. From the dropdown, pick the roles that can view new work items of that type by default. You need the Administrator role with the Administer spaces permission.

EXAM TRAP

Restrictions are not an option on the Free plan. Work-level security cannot be configured on any Free plan either.

New work only

A restriction covers only work items created after it is set. Work items that existed before the restriction keep their old visibility. Roles with the Restrict any work item permission can still change one work item's restriction while viewing it.

EXAM TRAP

Adding a restriction does not lock the work items already in the space. Only work created afterward is restricted.

When a role is deleted

Work locked to a single deleted role becomes inaccessible. If work is restricted to a set of roles, the other roles keep access when one role is deleted. If work is restricted only to a custom role such as Developer, deleting that role leaves nobody able to open it.

EXAM TRAP

Deleting a role does not hand its restricted work back to everyone. With a single custom role, the work becomes inaccessible.

Key takeaways

- A work type restriction applies only to work items created after you set it.
- Work restricted to one custom role becomes inaccessible if that role is deleted.
- Work items cannot be restricted on the Free plan.
- Roles from the Access page add to the access level; they never override it.

Sources: ACP-120 Exam Topics V2 Version Date: April 2025 1 Access, Permissions, Security (28% of the exam) (opens in a new tab) · Set up work types in team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Manage and administer team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Add people to team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab)

Domain 2 | 11% of the exam | 13 min read

General Project Configuration

Overview

This domain is about 11% of the exam, roughly 7 of its 60 questions.

Every point below comes from Atlassian's official documentation; each section lists its sources.

Understand project types, templates, and shared configurations

Start here

THINK FIRST

How do you choose between a team-managed and a company-managed space, and between Scrum and Kanban?

Why it matters: Questions describe a team's needs and ask which space type, template or board style fits, or what a shared configuration changes.

The two space types differ mainly in who administers them. Company-managed spaces share schemes and fields across many spaces, set up by Jira admins. Team-managed spaces keep their own configuration, so a team can change it without a Jira admin.

Key terms

Term	Meaning
Company-managed space	A space, formerly called classic, whose schemes and custom fields Jira admins set up and often share.
Team-managed space	A space, formerly called next-gen, whose configuration is its own and is not shared with other spaces.
Scheme	A mapping Jira admins use to tie settings, such as custom fields, to a company-managed space's work types.
Template	The starting setup you pick when you create a space, such as Scrum or Kanban.

Who administers it

The key difference is how each space type is administered. Company-managed spaces were once called classic, and team-managed spaces next-gen. In a team-managed space, anyone can run their team's work and process without a Jira admin.

Team-managed and company-managed spaces compared

Feature	Team-managed	Company-managed
Who configures it	The team itself, without a Jira admin	Jira admins, through schemes
Custom fields	Bound to the space and not shareable	Usually shared across many spaces
Effect of a change	No other space is affected	Shared fields reach every space that uses them

Shared configuration

Company-managed spaces share fields and schemes across spaces. Jira admins map settings, such as custom fields, to work types through schemes. This suits a team that needs advanced or shared field customizations across all users.

EXAM TRAP

A space admin cannot change company-managed statuses or workflows. Only Jira admins create and modify them.

Team-managed independence

Changes to a team-managed space affect no other space. Its configuration is its own. Custom fields you add stay bound to that space, so other spaces on the site cannot reuse them.

EXAM TRAP

Team-managed custom fields cannot be shared. When fields must be shared across all users, pick a company-managed space.

Who can create spaces

Any user can create a team-managed space by default. That includes non-admins. A Jira admin who wants to restrict this removes the Create team-managed spaces permission.

Picking a template

Pick a template first, then choose how the space is managed. After Create space, choose a Work management or Software development template and select Use template. Or choose the team-managed type first, then use Change template for Scrum or Kanban.

Scrum or Kanban

Scrum boards wait for sprints; Kanban boards cap and clear work. With Sprints enabled, the board shows no work items until a sprint starts. On a Kanban board, you can set a column limit, and Done items clear every **14** days.

EXAM TRAP

Team-managed spaces do not support parallel sprints. A team that must run sprints side by side cannot do it there.

No direct conversion

Jira cannot convert a team-managed space to company-managed. A Jira admin has to create a new company-managed space by hand. So choose the space type carefully at the start.

EXAM TRAP

There is no native convert option. Moving to company-managed means a Jira admin creates a new space manually.

Key takeaways

- The key difference between the two space types is how they are administered.
- Choose company-managed when fields must be shared or customized across all users.
- A team-managed change never affects other spaces, and its custom fields cannot be shared.
- Team-managed spaces do not support parallel sprints.
- No native feature converts team-managed to company-managed; a Jira admin builds a new space.

Sources: Learn how company-managed and team-managed spaces differ | Jira Cloud | Atlassian Support (opens in a new tab) · How do work types differ based on space type? | Jira Cloud | Atlassian Support (opens in a new tab) · Manage and administer team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Get started with team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Migrate between team-managed and company-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab)

Configure project details and sidebar

Start here

THINK FIRST

Why is renaming a space easy, while changing its key needs a plan?

Why it matters: Questions describe a change to a space's name, key or details and ask what breaks, what keeps working and who can do it.

A space name is a label, and filters pick up a new name on their own. A space key shows up in work item keys such as DEMO-1, so changing it touches links, filters and queries. Jira softens this by saving previous keys.

Key terms

Term	Meaning
Space key	The short uppercase code of a space, such as DEMO, used in work item keys.
Previous space key	An old key Jira saves after a key change so existing links and queries keep working.
Default assignee	Who a new work item goes to when nobody is chosen: Unassigned or the Space owner.
Space details	The Space settings page where you edit a space's details and select Save details; team-managed spaces set their category there.

Editing space details

Open Space settings, then Details, and select Save details. Space admins can edit the name, description, avatar, URL and lead without the Administer Jira global permission. They can only view the space's schemes, not select or edit them.

Renaming a space

A new space name updates in filters automatically. Filters across the Jira site show the new name without any extra work. A key change is different: board filters and dashboard filter gadgets then need the new key.

Who can change the key

Changing a key is for organization, site or Jira admins. Editing a key is not a simple task. A new key must be at least two characters, start with an uppercase letter, and use only uppercase letters or numbers.

> **EXAM TRAP**
> Being a space admin is not enough to change a space key. That needs an organization, site or Jira admin.

After a key change

Old links keep working, but saved queries need the new key. Jira saves previous keys automatically. Confluence work item macros also keep working, though the cache may take time to refresh.

What a space key change does to existing items

Item	After the key changes	What you do
Links to work items such as EXAMPLE-1	Still open the work item, now DEMO-1	Nothing; link aliases are not updated
Confluence work item macros	Keep working	Allow time for the cache to refresh

Item	After the key changes	What you do
Board filters and dashboard filter gadgets	Need the new key	Update them, and tell your users

Reusing an old key

An old key cannot go to a new space while still saved. It becomes available only if you delete the space it belonged to, or delete it from previous keys. Deleting a previous key can affect links, board filters, dashboard gadgets and JQL queries that still use it.

EXAM TRAP

Deleting a previous key is not harmless cleanup. Anything still using that key, such as links or JQL queries, can be affected.

Default assignee choices

The default assignee is either Unassigned or the Space owner. New spaces start with Unassigned. Unassigned is only possible when Allow unassigned work items is on in general configuration. To make a specific person the default, change the Space owner.

EXAM TRAP

You cannot pick any named person as a space's default assignee. You change the Space owner instead.

Category and URL

Company-managed categories are assigned by a Jira admin. In a team-managed space, you set the category yourself under Details. Space URLs exist only in company-managed spaces and show in the Spaces directory.

Key takeaways

- A space rename updates in filters automatically; a key change needs filters and gadgets updated.
- Only organization, site and Jira admins can edit or delete a space key.
- Previous keys are saved, so old links and queries keep working after a key change.
- The default assignee can only be Unassigned or the Space owner.

Sources: Edit a space's details | Atlassian Support (opens in a new tab) · Configure a space | Atlassian Support (opens in a new tab) · Configure spaces | Atlassian Support (opens in a new tab)

Manage versions

Start here

THINK FIRST

What should a Jira admin check before releasing a version, and who is allowed to create, edit and release one?

Why it matters: Questions describe a release situation and ask which permission, step or setting decides what happens to its work items.

A version groups features and fixes that ship together as one update. Admins set it up, track its progress on the release hub, and release it. At release time, Jira asks what to do with work that is still unresolved.

Key terms

Term	Meaning
Version	A set of features and fixes that ship together as a single update to your app.
Fix versions field	The work item field that links a work item to one or more versions.
Release hub	The page that summarizes a version's work items so you can spot remaining work.
Driver	The space admin who coordinates a release from start to finish.

Turning on releases

Only a Space admin can enable the releases feature. Once it is on, every work type in the space gains a **Fix versions** field. That field is how work items join a version, and one item can sit in several versions.

Who can do what

Each version task has its own permission. Adding a work item to a version needs **Edit work items**. Creating or editing a version needs Space admin or Manage versions. Releasing is the strictest: it needs space admin rights.

EXAM TRAP

Manage versions lets a user create or edit a version, but it does not let them release it. Releasing needs space admin permissions.

Naming and dates

Pick a name your teammates will recognize at a glance. The Start Date makes the Version Report more accurate when work begins long after planning. The End Date drives the days remaining shown on the Release Hub. The Driver defaults to whoever created the version.

Checking progress first

The release hub shows whether any work remains. It gives a summary and a breakdown of the version's work items. In the scrum version panel, a version with at least **1** work item shows a progress bar by status category. You can also search with the `fixVersion` JQL field.

EXAM TRAP

A done work item can still raise a warning on the release page when its pull request is open. Open review warnings, by contrast, need a Fisheye-Crucible integration.

Releasing with open work

Releasing asks what to do with unresolved work items. Open the Releases tab, pick the version, select its status such as Unreleased, then choose Release. Jira then asks how to handle unresolved items and for a release date. Approval is optional unless Require approvals was ticked.

EXAM TRAP

Require approvals does not apply to every release. A version can be released without approval unless that checkbox was selected in the create or edit Release modal.

Scrum versus Kanban

Scrum plans a version ahead; Kanban releases whenever you choose. Kanban suits continuous flow, so items need no version up front. On a company-managed Kanban board, released items leave the board once all their fix versions ship.

How versions behave on Scrum and Kanban

Feature	Scrum	Kanban
When to release	When the planned work is complete	At any time you choose
What the version holds	The work planned for it in advance	All work complete at release time

EXAM TRAP

The Kanban Release menu does not list every unreleased version. It shows only versions assigned to at least **1** work item in the Done column.

Key takeaways

- Releasing a version needs space admin permissions; Manage versions only covers create and edit.
- At release, you decide what happens to unresolved work items and enter a release date.
- Check the release hub first: it shows any remaining work in the version.
- A Kanban version can be released at any time and holds all work complete at that moment.

Sources: What is a version? | Jira Cloud | Atlassian Support (opens in a new tab) · Check the release status of a version | Jira Cloud | Atlassian Support (opens in a new tab) · Release a version | Jira Cloud | Atlassian Support (opens in a new tab) · Enable releases and versions | Jira Cloud | Atlassian Support (opens in a new tab) · Configure versions in a scrum space | Jira Cloud | Atlassian Support (opens in a new tab) · Use the release page to check the progress of a version | Jira Cloud | Atlassian Support (opens in a new tab) · Release your team's work in versions | Jira Cloud | Atlassian Support (opens in a new tab)

Configure components and auto-assignments

Start here

THINK FIRST

When a work item has several components, who ends up as its assignee, and why?

Why it matters: Questions describe a space's components and default assignees and ask who Jira assigns a new work item to.

Each component can carry its own default assignee. That component setting wins over the space's overall default assignee. When several components disagree, alphabetical order decides.

Key terms

Term	Meaning
Component	A part of a company-managed space that work items link to through the Component field.
Default assignee	The person a new work item is assigned to when created with a component.
Space default assignee	The space's overall default assignee, used unless a component default overrides it.
Component lead	The person, usually a team lead, who oversees work linked to a component.

Where components live

Components exist only in company-managed spaces. Each component is scoped to the space it was created in. Space admins configure them, and they can do so without the Administer Jira global permission. Everyone else in the space can view, search and link work items to them.

Default assignee options

A component offers several default assignee choices. You can pick a named person or a role. A role keeps working when someone leaves a team that changes often.

What each component default assignee option does

Option	Who gets the work item	Depends on
Component lead	The component's lead	A lead being set on the component
Space owner	The owner of the space	Who owns the space
Space default	Whoever the space's default assignee is	The space's default assignee
Unassigned	Nobody, if the site allows unassigned work items	The site allowing unassigned work items

EXAM TRAP

Unassigned is not guaranteed. The work item stays unassigned only when the site allows unassigned work items.

Component versus space default

A component default assignee overrides the space default assignee. With the Space default option, the component sends the work item to the space's default assignee. A component default set to anyone else takes priority over the space default.

EXAM TRAP

Many candidates expect the space default to win because it is set higher up. It is the other way round: the component setting takes priority.

Several components at once

With conflicting defaults, the alphabetically first component wins. Say a work item gets components named Backend and Mobile with different default assignees. Jira assigns it to the Backend default assignee, because Backend comes first alphabetically.

EXAM TRAP

The order you select the components in does not matter. Jira uses the component name that comes first alphabetically.

Limits to remember

A space can hold up to 10,000 Jira components. At that limit, admins cannot create more components until usage drops. Existing components and work items stay available. Compass components do not count toward this limit.

Key takeaways

- A component default assignee overrides the space's overall default assignee.
- With several components and different defaults, the alphabetically first component decides.
- Use a role as default assignee when the team changes often.
- Components exist only in company-managed spaces, scoped to their own space.

Sources: Configure Jira components | Jira Cloud | Atlassian Support (opens in a new tab) · What are Jira components? | Jira Cloud | Atlassian Support (opens in a new tab) · Configure spaces | Atlassian Support (opens in a new tab) · Review components per space | Atlassian Support (opens in a new tab)

Domain 3 | 18% of the exam | 11 min read

Issue Types, Fields, Screens

Overview

This domain is about 18% of the exam, roughly 11 of its 60 questions.

Every point below comes from Atlassian's official documentation; each section lists its sources.

Configure issue types

Start here

THINK FIRST

How does the role of a work type differ between company-managed and team-managed spaces?

Why it matters: Questions describe a team's way of working and ask which work types, epics or subtasks to set up and where.

In company-managed spaces, work types are labels that Jira admins wire into schemes. In team-managed spaces, each work type is the container for work, with its own fields and workflow. The space type decides how you configure work types.

Key terms

Term	Meaning
Work type	The kind of work item, such as story, bug, task or subtask.
Scheme	A company-managed mapping that ties work types to settings like screens and fields.
Epic	A work type that groups related work into a larger body, often over several sprints.
Subtask	A smaller piece of a bug, task or story, created beneath that work item.

Two models of work types

Company-managed work types feed schemes; team-managed ones hold the work. A Jira admin maps fields to company-managed work items through a work item screen scheme. A team-managed work type keeps its own fields and its own workflow.

Work types in company-managed and team-managed spaces

Feature	Company-managed	Team-managed
Role of a work type	A label Jira admins combine in schemes	The primary container for the work
Workflows	Only Jira admins create and modify them	Each work type has its own, unique to the space
Sharing with other spaces	Configuration can be shared	Configuration is not shared with any other space

Creating team-managed work types

You need the Administrator role with Administer spaces. A team-managed space can hold up to **30** work types. Renaming a work type, or changing its icon or description, updates it everywhere in Jira.

EXAM TRAP

You cannot create a custom parent or subtask work type in a team-managed space. Only custom standard work types are allowed.

Default task labels

A new team-managed space starts with Task or Story. Spaces started as Kanban label tasks as Task. Spaces started as Scrum label them as Story.

When to use epics

Use an epic for a larger body of related work. An epic is typically completed over several sprints. A work item can have only one parent. Company-managed work items can join parents only in company-managed spaces, and team-managed ones only in team-managed spaces.

EXAM TRAP

Do not create your own work type named Epic. Roadmaps and reports in team-managed spaces only work with the suggested Epic work type.

When to use subtasks

Use subtasks to break a bug, task or story into smaller tasks. Team-managed spaces enable subtask work types by default. The suggested subtask type also powers board swimlanes and progress tracking. Clearing a parent from the board clears its subtasks too, whatever their status.

EXAM TRAP

In team-managed spaces, subtasks cannot sit directly beneath an epic. Unlike company-managed spaces, they go under stories, bugs or tasks.

Restricting a work type

A restriction applies only to newly created work items. Work items created before the restriction are unaffected. Restricting work items is not possible on the Free plan.

Key takeaways

- Company-managed work types are combined into schemes by Jira admins; team-managed ones carry their own fields and workflows.
- A team-managed space allows up to **30** work types, all custom ones being standard types.
- Use the suggested Epic work type so roadmaps and reports keep working.
- Team-managed subtasks go under stories, bugs or tasks, never directly under an epic.

Sources: How do work types differ based on space type? | Jira Cloud | Atlassian Support (opens in a new tab) · Manage and administer team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Set up work types in team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Manage epics in team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Manage subtasks in team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Migrate between team-managed and company-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Get started with team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab)

Configure fields

Start here

THINK FIRST

When should a field be shaped by a context, and when should it live in just one space?

Why it matters: Questions describe a field requirement and ask where to create the field, how to scope it, or how to make it mandatory.

Company-managed fields are created by Jira admins and tailored with contexts. Team-managed fields belong to a single space, and every work type in that space can use them. Pick the model that matches who owns the space.

Key terms

Term	Meaning
Field context	A setup for a field that changes its default value, options or selectable users where it applies.
Team-managed field	A field that lives inside one team-managed space and cannot be shared with other spaces.
Required field	A field that must be filled out before a new work item of that type can be created.
User filtering	A context setting that limits a user picker field to chosen groups or space roles.

Two places to create fields

Who creates a field depends on the space type. In company-managed spaces, Jira admins create fields in their settings. Team-managed spaces also let you create fields straight from list view.

Company-managed and team-managed fields compared

Feature	Company-managed	Team-managed
Where fields are made	Jira admin settings	Space settings, or while on list view
How a field is scoped	A context changes a field only where that context is used	Contained in its own space; it cannot be shared
Field limit	Up to 700 fields in a space	Up to 50 custom fields in the space

What a context changes

A context tailors one field for where it is used. It can set a default value for open text fields. It can offer a different list of options, or restrict which users can be picked. You open it from the field's More actions menu, under Contexts and default value.

EXAM TRAP

A context's default value or alternate option list does not apply everywhere. It shows only where that context is used.

Filtering user pickers

User filtering works only on user picker fields. It applies to the single user and multiple user picker types. You limit names by group or space role, which also hides inactive users.

EXAM TRAP

Turning on user filtering without choosing a group or space role does not show everyone. It shows no users at all.

Fields in team-managed spaces

A team-managed field belongs only to its own space. Fields you create there are available to every work type in that space. On several work types, a field keeps one name and description. Checkbox and dropdown options are shared, but each work type can have its own default value.

EXAM TRAP

You cannot share a team-managed field with another team-managed or company-managed space. You can still filter by it across the site.

Making a field required

Tick Required on the work type, then save. After saving, new work items of that type cannot be created until the field is filled out. This is how a team-managed space makes a field mandatory.

Formatting number fields

A number field can show as number, currency or percentage. The format applies to every space using the same field. People entering data cannot change it. Number fields accept values between **-1 trillion** and **1 trillion**.

Key takeaways

- Contexts change a field's default, options or allowed users only where the context is used.
- User filtering with no group or space role selected shows no users in the field.
- Team-managed fields cannot be shared with any other space.
- A team-managed space can have up to **50** custom fields.

Sources: Add custom fields to your space | Jira Cloud | Atlassian Support (opens in a new tab) · Configure advanced field options using contexts | Atlassian Support (opens in a new tab) · Customize work item fields in team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Manage and administer team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Optimize fields per space | Atlassian Support (opens in a new tab) · Set up work types in team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Available custom fields for team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab)

Configure screens and issue layout

Start here

THINK FIRST

When do you change a screen in the Jira admin panel, and when do you change a space's work item layout instead?

Why it matters: Questions ask who can create, edit or delete a screen, and how to arrange fields for a work type in each space type.

Company-managed spaces run on screens and schemes that a Jira admin configures, and a change reaches every space that uses them. The work item layout arranges fields for one space. Team-managed spaces set fields per work type in their own settings.

Key terms

Term	Meaning
Screen	A company-managed configuration whose tabs display fields. Jira admins manage it under Work items, then Screens.

Term	Meaning
Work item layout	How fields are arranged on a space's work items, edited in Space settings, then Work items, then Layout.
Hide when empty line	A divider in the layout. Empty fields below it sit under More fields until they get a value.
Required checkbox	A team-managed field setting that blocks creating a work item of that type until the field is filled.

Shared configuration

Company-managed screens and schemes need a Jira admin. A change to a scheme or screen reaches every company-managed space that uses it. So plan the change for all of those spaces, not just one.

EXAM TRAP

Editing a shared screen is not a change to one space. Every company-managed space that uses that screen changes too.

Creating a screen

Screens live in the Jira admin panel under Work items, then Screens. Open the admin panel from its icon in the top navigation. There you view and edit existing screens, or create a new one with Add screen.

Editing and deleting screens

Rename a screen with More actions, then Edit. The same option also changes its description. To delete a screen, first remove its links to screen schemes and workflow transitions.

EXAM TRAP

A screen still tied to a screen scheme or a workflow transition cannot be deleted yet. Remove those associations first.

Editing the layout

Edit a layout in Space settings, then Work items, then Layout. Open Space settings from More actions (•••) beside the space name. Both Jira admins and space admins can configure the layout, but some screen tasks stay with Jira admins.

What Jira admins and space admins can change

Task	Jira admin	Space admin
Configure company-managed screens and schemes	Yes	No
Configure a screen's tabs	Yes	No, and cannot reorder fields in a tab

Task	Jira admin	Space admin
Configure a work item layout	Yes	Yes
Copy a layout to other spaces	Yes	No

Hide when empty

Empty fields below the line hide under More fields. Fields above the hide when empty line show in the Details group. A field below the line moves up to Details once it has a value.

EXAM TRAP

A field below the line is not hidden for good. As soon as it holds a value, it moves to the Details group.

Shared view screens

Work types that share a view screen share their layout fields. Tasks and subtasks use the same view work item screen by default. So you configure their fields together as a set, not one at a time.

Copying a layout

Only a Jira admin can copy a layout to other spaces. The copy overrides the layouts in the target spaces. It creates no link, so each space can still change its layout later on its own.

EXAM TRAP

Copying a layout does not keep spaces in sync. A later change in one space leaves the others as they are.

Team-managed work types

Team-managed spaces set fields per work type in Space settings. Go to Space settings, then Work types, and pick the work type. Tick Required on a field to make it mandatory for that type, then save.

EXAM TRAP

Required does not fill in a value for you. It blocks creating a new work item of that type until someone fills the field.

Key takeaways

- A change to a company-managed screen or scheme affects every space that uses it.
- Delete a screen only after removing its screen scheme and workflow transition links.
- Only Jira admins configure screen tabs or copy a work item layout to other spaces.
- In team-managed spaces, you set fields and the Required checkbox per work type in Space settings.

Sources: What are team-managed and company-managed spaces? | Jira Cloud | Atlassian Support (opens in

a new tab) · Configure the layout of the work item | Atlassian Support (opens in a new tab) · Customize work item fields in team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Manage existing work item screens | Atlassian Support (opens in a new tab) · Copy a work item layout to other spaces | Jira Cloud | Atlassian Support (opens in a new tab)

Domain 4 | 14% of the exam | 13 min read

Workflows and Automation

Overview

This domain is about 14% of the exam, roughly 8 of its 60 questions.

Every point below comes from Atlassian's official documentation; each section lists its sources.

Configure company-managed workflows

Start here

THINK FIRST

Which part of a transition would you use to block, check or automate a move between statuses?

Why it matters: Questions describe a workflow requirement and ask which transition part, board mapping or Resolution setup meets it.

A workflow is statuses joined by one-way transitions. Each transition can be shaped by triggers, conditions, validators, post functions and properties. Setting Resolution on the way to Done is what tells reports the work is complete.

Key terms

Term	Meaning
Transition	A one-way link that moves a work item from one status to another.
Global transition	A transition that lets any status in the workflow move to one particular status.
Post function	Extra processing that runs after a transition is performed.
Resolution	The field reports use to mark work complete; filling it sets the resolved date.

Statuses and transitions

Transitions are one-way, so a round trip needs two. Statuses fall into the To do, In Progress and Done categories. Only Jira admins can edit a company-managed space's workflows.

EXAM TRAP

One transition between two statuses does not let work go back. Moving back and forth needs a second transition.

Five parts of a transition

Admins control triggers, conditions, validators, post functions and properties. Conditions and validators fail differently. A failed condition hides the transition button, while a failed validator keeps the work item in its current status.

What each part of a transition does

Part	What it does	Watch out
Triggers	Transition work items on events in a connected development tool	Need an integration such as Bitbucket, GitHub, Bamboo or Crucible
Conditions	Check that this user should perform the transition	If one fails, the user does not see the transition button
Validators	Check that input, such as screen input, is valid first	If one fails, the work item stays put and post functions do not run
Post functions	Carry out extra processing after the transition	Essential ones cannot be deleted or reordered
Properties	Key-value pairs that further customize the transition	To change one, delete it and add an updated property

Post function order

Notifications fire only at the end of the post functions. Jira calls notification listeners after the whole sequence finishes. You can insert your own post functions between the essential ones.

Statuses and boards

Board configuration maps workflow statuses to columns. When a board is grouped by status, the column a work item sits in shows its status. Board settings also cover columns, swimlanes and quick filters.

Why Resolution matters

Reports treat a work item as complete once Resolution is set. Jira sets the resolved date when Resolution changes from Unresolved to a value. Resolved work items also show their key in strikethrough.

EXAM TRAP

A Done status alone does not mark work complete for reports. Set Resolution on every transition into Done or another end state, such as Won't do.

Two ways to set Resolution

Set it automatically, or prompt people when work moves to Done. To prompt, show a screen containing Resolution, such as the Resolve work item screen. To set it automatically, add an Update Work Item Field post function that picks a resolution.

EXAM TRAP

Adding the post function alone is not the whole setup. The transition must also use no screen, or a screen without the Resolution field.

Finer Resolution control

A transition property can hide chosen resolutions. Use the key `jira.field.resolution.exclude` with resolution IDs separated by commas and no spaces. To set Resolution at creation, place Update Work Item Field after Create the work item, then add Store Work Item.

Key takeaways

- Transitions are one-way; a back-and-forth move needs two transitions.
- A failed condition hides the transition button; a failed validator stops the move and skips post functions.
- Set Resolution on every move into Done or another end state, because reports rely on it.
- Notifications from a transition fire only after all its post functions finish.

Sources: Workflows and statuses for boards in business spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Configure advanced work item workflows | Atlassian Support (opens in a new tab) · Configure resolutions in a Jira workflow | Atlassian Support (opens in a new tab) · Use workflow triggers for company-managed spaces | Atlassian Support (opens in a new tab) · Configure a company-managed board | Jira Cloud | Atlassian Support (opens in a new tab) · What are work item statuses, priorities, and resolutions? | Atlassian Support (opens in a new tab)

Configure team-managed workflows

Start here

THINK FIRST

How do work types, statuses, board columns and rules fit together when you change a team-managed workflow?

Why it matters: Questions describe a team-managed workflow change and ask what Jira does, what limit applies or which rule to use.

In a team-managed space, each workflow belongs to one or more work types. Statuses live in the workflow editor, and the board shows them only through columns. Rules add control to transitions from the workflow toolbar.

Key terms

Term	Meaning
Workflow editor	Where you create and manage statuses, and add rules to a workflow's transitions.
Status category	One of To do, In progress or Done; every status belongs to one.

Term	Meaning
Any status transition	The global transition a new status gets, letting work in any status move into it.
Workflow rule	A rule on a transition that restricts it, checks details first or acts afterward.

Workflows belong to work types

Open a work type to edit the workflow it uses. Go to Space settings, then Work types, pick the work type and choose Edit workflow. One workflow can serve a single work type or several. Every team-managed space starts with the Jira default workflow, and space admins can create, edit or delete workflows.

Adding statuses

Pick a status category in the toolbar, then add the status. A space can hold up to **100** statuses across all workflows and **50** in any one workflow. A space policy may block new statuses, leaving only statuses shared across the site. Keep the workflow lean: each status adds complexity.

EXAM TRAP

A new status is not on the board yet. It has no column by default, so its work items stay hidden from the board and backlog.

Changing and deleting statuses

Renaming a shared status changes it in every workflow that uses it. Deleting a status works differently: it only leaves the workflow you are editing. Its transitions and their rules go with it. Jira also asks you to move work items out of it into a valid status.

EXAM TRAP

Deleting a status does not keep its transition rules. They are deleted together with the transitions attached to that status.

The Any status transition

New statuses accept work from any other status by default. The Any status label marks this global transition. Keeping it lets people move work freely. Teams with strict compliance rules might remove it.

Workflow rules

Add rules from Rules in the workflow toolbar, per transition. Rules can restrict a transition, validate details first or perform actions afterward. Each transition allows up to **10** restrict groups of **50** rules, **50** validate rules and **50** action rules.

What common team-managed workflow rules do

Rule	What it does	Detail to remember
Restrict who can move a work item	Limits who can use the transition	Assignee, reporter, a user, a role, a group or a permission

Rule	What it does	Detail to remember
Update a work item field	Changes a field during the transition	Text is added to existing text, not replaced
Restrict to when it has been through a status	Allows the move only after a given status	Can ignore status updates from looped transitions

Columns versus statuses

In a new space, creating a column also creates a status. That link breaks when a column holds several statuses or the names differ. The column then shows each status as a drop zone. In Columns and statuses settings, a new column creates no status, and you can delete only columns.

EXAM TRAP

To manage columns and statuses from the board again, go back to one status per column with matching names.

Board rules

Board rules act when work items move between columns. Currently **2** exist: change a work item's assignee and update a work item field. Add one from the board's more icon, then Manage rules, then Add rule.

Key takeaways

- Limits: **100** statuses per space and **50** per workflow.
- A status with no column hides its work items from the board and backlog.
- Deleting a status removes its transitions and their rules, only in the workflow you edit.
- Update a work item field appends to existing text instead of replacing it.

Sources: Set up a workflow in a team-managed software space | Jira Cloud | Atlassian Support (opens in a new tab) · Create and edit multiple workflows in team-managed projects | Jira Cloud | Atlassian Support (opens in a new tab) · Assign statuses and edit columns in a team-managed space | Jira Cloud | Atlassian Support (opens in a new tab) · Add or remove workflow rules in team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Create, edit and delete statuses in team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · What are Jira workflows? | Jira Cloud | Atlassian Support (opens in a new tab) · Available workflow rules in team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Manage columns and statuses in team-managed software spaces | Jira Cloud | Atlassian Support (opens in a new tab)

Configure automation rules

Start here

THINK FIRST

When an automation flow must act on linked or related work items, how do scope, branches and permissions decide whether it works?

Why it matters: Questions describe a flow that misbehaves and ask which part, scope, smart value or permission fixes it.

Every flow is a chain: a trigger starts it, conditions act as checkpoints, and actions make the changes. Branches open separate paths, such as one for each related work item. Scope decides which spaces the flow runs in, and permissions decide who may build it.

Key terms

Term	Meaning
Trigger	The event that starts a flow, such as a comment being added.
Condition	A checkpoint that tests criteria; if the test fails, the flow stops.
Branch	A separate execution path, often run once for each related work item.
Smart value	A placeholder in double curly braces, such as `{{issue.summary}}`, filled in when the flow runs.
Flow actor	The account whose permissions the flow uses when it runs.

The parts of a flow

A flow is built from triggers, conditions, actions and branches. Each part has one job. Learn which part to change when a flow runs too often, does the wrong thing or touches the wrong work item.

What each part of an automation flow does

Part	Job	Example
Trigger	Starts the flow when an event happens	A comment is added
Condition	Tests criteria and stops the flow if the test fails	Priority is High
Action	Makes a change or performs a task	Edit a work item or send a notification
Branch	Runs a separate path, such as on each subtask	Act on subtasks when a work item is Done

Conditions and If/else

A failed condition stops every action after it, except in an If/else block. Conditions can sit anywhere in the chain, or on the trigger to filter the whole flow. Combine them with logical operators such as AND, OR and XOR. In an If/else block, the if part runs only when all its conditions pass; otherwise the else blocks are checked. You can nest If/else **2** levels deep.

EXAM TRAP

If/else blocks do not work inside branches. Branches cannot be nested either.

Branching on related work items

Inside a branch, `{{issue}}` means the related work item, not the trigger. Use `{{triggerIssue}}` to reach the trigger work item from inside a branch. Branches on many work items run in parallel with no set order. The main branch keeps going before the sub-branch starts, and a variable made in a branch stays in that branch.

EXAM TRAP

A Comment on work item action placed after Create work item comments on the trigger work item. To act on the new item, add a branch for All created work items.

Reaching linked and related items

Linked work has its own trigger, condition and smart values. The Work item linked trigger fires for any link type you pick and offers `{{destinationIssue}}` and `{{linkType}}`. The Related work items condition checks subtasks, parent, Epic, created or linked items. `{{issue.parent}}` works only when the active work item is a subtask.

EXAM TRAP

A single-project flow cannot act on a work item in another project. The flow must be multi-project or global and run in that item's project.

Smart value syntax

Smart values use dot notation inside double curly braces. Multiword properties use camelCase. Functions always end in parentheses, as in `{{now.plusDays(5)}}`. A missing value prints empty unless you add a default after a pipe. Start a list with `#` to loop over it, and close it with `{{/}}`. The Create variable action makes your own smart values.

EXAM TRAP

`{{comment}}` works only with the Issue commented trigger. It stays empty with Issue transitioned, even when a comment was added.

Project versus global scope

Scope decides which spaces a flow runs in. A Space type scope covers all spaces of one chosen type: software, service or business. Global scope covers every Jira space in the instance. Users with the Administer Jira global permission can create flows of any scope, including Global.

EXAM TRAP

Some steps exist only at one level. Form steps work only in project automation, and the Assets Object trigger works only in global flows.

Permissions and the flow actor

Who can build a flow depends on the space type. Company-managed spaces need Administer spaces and Browse spaces. Team-managed spaces need Administrator access. Holders of Administer Jira can also view Jira-wide automation data, such as executions used. In Global automation's Global configuration, admins can stop space admins from managing space flows.

EXAM TRAP

Validate query checks JQL with your own permissions, but the running flow uses the flow actor's permissions. The two can find different work items.

Key takeaways

- A failed condition stops the flow, unless it is an If/else block.
- In a branch, `{{issue}}` is the related work item; use `{{triggerIssue}}` for the trigger.
- Acting on work in another project needs a multi-project or global flow.
- Validate query uses your permissions; the running flow uses the flow actor's.

Sources: Use automation steps in a flow | Cloud automation Cloud | Atlassian Support (opens in a new tab) · Add conditions to an automation flow | Cloud automation Cloud | Atlassian Support (opens in a new tab) · Branch automation flows to perform actions on related work items | Cloud automation Cloud | Atlassian Support (opens in a new tab) · What are flow details and settings? | Cloud automation Cloud | Atlassian Support (opens in a new tab) · Permissions required to manage automation flows | Cloud automation Cloud | Atlassian Support (opens in a new tab) · What are smart values? | Cloud automation Cloud | Atlassian Support (opens in a new tab) · Jira automation conditions | Cloud automation Cloud | Atlassian Support (opens in a new tab) · What is flow branching? | Cloud automation Cloud | Atlassian Support (opens in a new tab)

Domain 5 | 8% of the exam | 14 min read

Notifications

Overview

This domain is about 8% of the exam, roughly 5 of its 60 questions.

Every point below comes from Atlassian's official documentation; each section lists its sources.

Configure company-managed notifications

Start here

THINK FIRST

When a work item changes in a company-managed space, how does Jira decide who gets an email?

Why it matters: Questions describe a change to a work item and ask which event fires, who is notified, or why someone got no email.

A notification scheme maps each event to the recipients who should get an email. The scheme is assigned to a space. Even then, a person only gets the email if they can see the work item.

Key terms

Term	Meaning
Notification scheme	Maps events to email recipients and is assigned to one or more spaces.
Event	A named change to a work item, such as resolved, closed or updated, that can trigger email.
Post function	A step on a workflow transition that can be set to fire an event, such as a custom event.
Custom event	An event you add yourself and fire from a workflow transition's post function.
Space role	A recipient type covering the members of one role in the space; preferred over groups.

Schemes link events to people

A notification scheme maps events to email recipients. You assign the scheme to a space, and several spaces can share one scheme. Jira ships with the Default Notification Scheme, and every new space uses it by default.

EXAM TRAP

A space admin without the Administer Jira global permission can view the space's notification scheme but cannot select or edit it.

Switching a space's scheme

Change the scheme from the space's Notifications settings. Open Space settings, then Notifications. Choose Actions, then Use a different scheme, pick the scheme and select Associate. To stop all email, choose None in the Schemes dropdown, or edit the scheme so it sends nothing.

EXAM TRAP

Editing a shared scheme so it sends nothing silences every space that uses that scheme, not only the one you meant.

Choosing recipients

Each event can notify people, roles, groups and watchers. Recipient types include Current assignee, Reporter, Current user, Space owner and Component lead. You can also choose a Single user, a Group, a Space role or All watchers. Prefer space roles over groups, because roles help keep the number of schemes down.

Which event fires

Resolved and closed are two separate events. A work item can be closed without being resolved, so the two fire separately. Deleting a comment has no event of its own; Jira sends that email as a Work item updated event.

Three events that are easy to mix up

Event	Fires when	Watch out for
Work item resolved	A work item is resolved, usually after it is fixed	Not the same event as closed
Work item closed	A work item is closed	Can fire without the item being resolved
Work item updated	Jira sends a deleted comment's email as this event	There is no separate comment-deleted event

EXAM TRAP

Looking for a comment-deleted event in the scheme. There is none; Jira sends that email as a Work item updated event.

Custom events for transitions

A custom event lets one transition send its own email. Setting one up takes **3** steps: add the event, set the scheme to email on it, and make the transition's post function fire it. Add it under Settings, System, Events,

with the Generic event template.

EXAM TRAP

A new custom event marked inactive is not broken. It stays inactive until a notification scheme or a post function uses it.

Who actually receives it

Only people who can see the work item get the email. Each recipient needs the Browse Spaces permission and membership in any security level on the item. Someone on **2** or more recipient lists gets only the first email Jira encounters. By default, users are not told about their own changes.

EXAM TRAP

A user who is both the reporter and in a notified role does not get two emails. Jira sends only the first one it encounters.

Personal settings on top

Each user can turn off some emails in personal settings. By default, users get email for activity on items they watch, report or are assigned, and when someone mentions them. They can uncheck the cases they do not want. They can also choose to be told about their own changes in their profile.

Key takeaways

- A notification scheme maps events to recipients, and one scheme can serve several spaces.
- New spaces use the Default Notification Scheme until an admin associates a different one.
- Use space roles rather than groups as recipients to keep the number of schemes low.
- A custom event needs **3** steps: add it, map it in the scheme, and fire it from a post function.
- No one gets an email about a work item they are not allowed to see.

Sources: Configure notification schemes | Atlassian Support (opens in a new tab) · Configure email notifications for a custom event | Atlassian Support (opens in a new tab) · Configure spaces | Atlassian Support (opens in a new tab) · Configure email notifications | Atlassian Support (opens in a new tab)

Configure team-managed notifications

Start here

THINK FIRST

How would you set up a team-managed space so the right people hear about each work item event?

Why it matters: Questions describe a team-managed space and ask how to add, change or remove a notification, or who will receive it.

Each team-managed space keeps its own list of notifications, managed by its admins. Every entry pairs a work item event with the people or roles to email. You add, edit or delete entries to change who hears what.

Key terms

Term	Meaning
Space admin	A person who configures and customizes the email notifications of one team-managed space.
Space role	A role unique to one team-managed space. You assign people and groups to it to control their access.
Work item event	An action, such as creating, assigning or commenting on a work item, that can trigger an email.
Space lead	The person who leads the space. It is one of the recipients a notification can target.

Set per space

Each team-managed space has its own notifications. Space admins configure and customize email for one space at a time. You need the `Administer spaces` permission. You can also set the email address that notifications are sent from.

EXAM TRAP

Changing notifications in one team-managed space does not change any other team-managed space. Each space is configured on its own.

Default recipients

By default, watchers, assignees and reporters get emails. A team-managed space already emails these three groups about work item events. You change the list only when your team needs something different.

EXAM TRAP

The space lead is not a default recipient. Out of the box, only watchers, assignees and reporters are notified.

Events you can notify on

Work item, comment and worklog actions can trigger email. You can tell people when someone creates, assigns, updates, comments on, moves or deletes a work item. Editing or deleting a comment counts too, as does logging, updating or deleting work.

Choosing recipients

Pick from six recipient types, including a space role. Recipients can be all watchers, the reporter, the space lead, the current assignee, the current user or a space role. Choosing a role reaches the people and groups assigned to it.

EXAM TRAP

The current assignee and the current user are separate options. Picking one does not include the other.

Add, edit or delete

All three changes start in Space settings > Notifications. Open it from More actions (•••) next to the space name in the sidebar. Then use Add notification, or the menu in the Actions column to edit or delete.

The three ways to change team-managed notifications

Feature	Add	Edit	Delete
Where you start	The Add notification button	Actions column, then More actions (•••)	Actions column, then More actions (•••)
What you choose	The event, then the users and roles	The users or roles	No recipients; just the Delete option
Final button	Add	Save	Delete
Use it to	Tell people about a key event	Change who gets an existing email	Stop emails that would spam users

EXAM TRAP

To stop all emails for an event, delete its notification. Editing only changes who receives it.

When a role is deleted

Notifications tied to a deleted role stop working. They are not cleaned up for you, so remove them manually. The people and agents who had the role stay in the space.

EXAM TRAP

Deleting a role does not delete its notifications. They stay behind, broken, until you remove them yourself.

Key takeaways

- Space admins with the `Administer spaces` permission set notifications for each team-managed space on its own.
- By default, a work item's watchers, assignees and reporters receive its event emails.
- A notification can target a space role, reaching the people and groups assigned to it.
- Deleting a role breaks its notifications; you must remove them by hand.

Sources: Customize notifications in team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Manage and administer team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Manage how people and agents access your team-managed space | Jira Cloud | Atlassian Support (opens in a new tab)

Understand personal notification settings

Start here

THINK FIRST

If a user turns a notification on in their settings, why might they still never receive it?

Why it matters: Questions describe a user's notification complaint and ask whether personal settings or the admin's setup explains it.

The Jira admin decides which notifications exist. Each user's personal settings then filter what reaches them. A personal setting can narrow what you get, but it cannot bring back a notification the admin turned off.

Key terms

Term	Meaning
Personal settings	Per-user choices such as language, timezone, watch settings and email type.
Default user preferences	Admin-set defaults applied to new accounts, which each user can change later.
Watcher	A user who follows a work item and gets email when it is updated or commented on.

Finding your settings

Open Settings at the top right, then Notification settings. It sits under Personal Jira settings. You need to be logged in to change it. Visitors who are not logged in get the site's default preferences.

Who gets email by default

Watchers, reporters, assignees and mentioned users get activity emails. Users can switch off the Send me emails for work item activity toggle. They can also tick only the cases they want, including changes they make themselves.

Settings worth knowing

Several personal settings change which emails you get and how they look. Admins set the defaults; each user can then change them.

Common personal notification settings

Setting	What it controls	Watch out
Email format	Text or HTML for outgoing emails	An admin can force one with Apply, and users then cannot edit it
Notify users of their own changes	Email about your own updates too, or about others only	Jira's default is not to notify you of your own changes

Setting	What it controls	Watch out
Watch your work items	Auto-watching items you create or comment on	You then get email when they are updated or commented on
Customize space notifications	Specific notifications for chosen spaces	Works for up to 50 spaces

A filter on the admin's setup

Personal settings act as a filter over the admin's configuration. If the admin turned a notification off, you may not get it, even when your settings ask for it. Clearing every checkbox may still leave admin-configured emails coming.

EXAM TRAP

Turning a notification on in personal settings does not override the admin. A notification the admin switched off may still never arrive.

Narrowing to what matters

To get email only for mentions, keep only Someone mentions you ticked. Untick every other work item activity checkbox. Settings can mix freely, such as email for mentions but none as the reporter.

Moving to Slack

Personal Slack notifications are on once you connect your account. With /jira notify you choose Essentials, which is recommended, or All. Then switch off activity emails to avoid duplicate messages.

EXAM TRAP

Connecting Slack does not stop Jira emails. Turn off the Send me emails for work item activity toggle yourself to avoid duplicates.

When no email can arrive

Jira emails only people who can view the work item. They need Browse Spaces and membership of any security level on it. Jira also sends email notifications only when SMTP email is enabled.

Key takeaways

- Personal notification settings filter the admin's configuration; they cannot add back a notification the admin turned off.
- By default, watchers, reporters, assignees and mentioned users get work item activity emails.
- Jira does not email you about your own changes by default.
- An admin can force an email format with Apply, locking that setting for users.

Sources: Manage your Jira personal settings | Jira Cloud | Atlassian Support (opens in a new tab) · Configure the user default settings | Atlassian Support (opens in a new tab) · Configure email notifications | Atlassian Support (opens in a new tab) · Configure notification schemes | Atlassian Support (opens in a new tab) · Get

Jira notifications in Slack | Jira Cloud | Atlassian Support (opens in a new tab)

Configure mail handlers

Start here

THINK FIRST

How would you set up a mail handler so incoming email becomes the right work item, assigned to the right person?

Why it matters: Questions describe incoming email and ask which handler option, default or setting explains what Jira created or assigned.

A mail handler scans a mail server on a schedule and turns each message into a work item or a comment. Its options decide the reporter and the assignee. When assignment goes wrong, check the CC Assignee order and the space's assignee setting.

Key terms

Term	Meaning
Mail handler	A scheduled job that scans a mail server and turns emails into new work items or comments.
Default Reporter	The user Jira names as reporter when the sender's address matches no existing user.
CC Assignee	An option that assigns the work item to the first CCed user, then tries the To and BCC fields.
Bulk email	Automated mail whose Precedence header is bulk, or whose Auto-Submitted header is not set to no.

Handler basics

Pick a mail server, a scan delay and a handler type. For IMAP you can also name a folder other than the inbox. The default handler uses `createusers=false`, `stripquotes=true` and `bulk=ignore`.

Comment or new work item

One handler type adds a comment when the subject has a work item key. That handler is called Create a new work item or add a comment. With no key in the subject, it creates a new work item in the default space. The subject becomes that work item's summary.

EXAM TRAP

An email with an empty subject is not turned into a work item at all. Jira needs the subject to fill the summary.

Emails Jira will not take

Jira skips emails sent more than 7 days ago. Size matters too. Message data and attachments together can reach **25** MB at most.

Mail server defaults

Leave the port blank to use the protocol's default. The timeout defaults to **10000** ms. A timeout of **0** or less makes Jira wait for the server forever.

Default incoming mail server ports

Setting	POP	IMAP
Default port	**110**	**143**
Secure default port	**995** (SECURE_POP)	**993** (SECURE_IMAP)

Unknown senders

The Default Reporter covers senders who match no Jira user. It needs permission to create work items in the handler's space. To accept mail from people without accounts, make a dummy Jira user and set it as Default Reporter.

EXAM TRAP

A mail handler cannot spread mail across several work types: each handler takes only **one** work type. For unknown senders, use the Default Reporter option.

Bulk and looping mail

The Bulk option decides what happens to automated mail. It can ignore, forward, delete or accept the email. Forwarding is the advised choice, because it helps prevent mail loops with other automated services.

EXAM TRAP

Setting the mail loop detection threshold to **0** does not tighten it. It turns detection off completely, which is not recommended.

Troubleshooting CC Assignee

CC Assignee tries the first CCed user, then To, then BCC. Each field is checked for an address that belongs to a valid user. If no field has one, the handler sets no assignee.

EXAM TRAP

CC Assignee does not give up after the CC field. With no valid CCed user, it checks To and then BCC.

Space assignee setting

With Allow unassigned work items off, every work item needs an assignee. In that case the assignee defaults to the space owner. With the setting on, the space's default assignee is Unassigned.

Key takeaways

- The Create a new work item or add a comment handler comments on a keyed subject; with no key, it creates a work item.
- Jira processes an email only if it has a subject and was sent within the last **7** days.
- The Default Reporter handles unknown senders and needs permission to create work items in the space.
- CC Assignee checks CC, then To, then BCC; if none matches a user, no assignee is set.

Sources: Create work items and comments from email | Atlassian Support (opens in a new tab) · Configure Jira app options | Atlassian Support (opens in a new tab)

Domain 6 | 12% of the exam | 10 min read

Advanced User Features

Overview

This domain is about 12% of the exam, roughly 7 of its 60 questions.

Every point below comes from Atlassian's official documentation; each section lists its sources.

Write advanced JQL queries

Start here

THINK FIRST

How do fields, operators, functions and keywords fit together into a JQL query that does what you mean?

Why it matters: Questions show a search need or a JQL query and ask which query works, what it returns, or why basic search cannot show it.

Every JQL clause is a field, an operator and one or more values or functions. Keywords join clauses, and parentheses decide what is evaluated first. Some advanced queries cannot be shown in basic search.

Key terms

Term	Meaning
Clause	A simple JQL query: a field, then an operator, then values or functions.
Field	A word for a Jira field, or a custom field already defined in Jira.
Function	A word followed by parentheses that may hold explicit values or Jira fields.
Keyword	A word that joins clauses or changes the logic of clauses or operators.

Anatomy of a clause

A clause reads field, operator, then value or function. In `project = "TEST" AND assignee = currentuser()`, the AND keyword joins two clauses. It finds work items in TEST assigned to the logged-in user.

The parts of a JQL query

Part	What it is	Example
Field	A Jira field or an already defined custom field	project
Operator	Compares the field with values on its right; some take NOT	=
Value or function	An explicit value, or a word followed by parentheses	"TEST" or currentuser()
Keyword	Joins clauses or alters the logic of clauses or operators	AND

Functions and autocomplete

Autocomplete gives no help inside function parameters. For other parts, it lists only the first **15** matches, in alphabetical order. Type more text if the match you need is missing.

> **EXAM TRAP**
> An empty suggestion list inside a function's parentheses is not an error. Autocomplete never suggests function parameters.

Parentheses and precedence

Parentheses set the order in which operators apply. Without them, Jira evaluates the statement left to right. Grouping clauses also lets you apply NOT to the whole group.

> **EXAM TRAP**
> Do not assume Jira reorders your clauses. Without parentheses, it evaluates the statement strictly left to right.

Relative date ranges

Relative dates such as -5d count back from today. The query `"Target end" ⩽ -5d` finds work items whose target end is earlier than five days ago.

What basic search cannot show

Some JQL cannot be translated back to basic search. Advanced search also offers criteria basic search lacks, such as ORDER BY.

JQL that may not translate to basic search

Query feature	Basic search	What helps
An OR operator	Not translated	Use IN instead, such as project in (A, B)
NOT, EMPTY, or !=, IS, IS NOT, >, >=, <, <=	May not translate	Spot these operators before switching to basic search

Query feature	Basic search	What helps
A space field like fixVersion with no space named	May not translate	Add the space, such as AND project=JRA

Key takeaways

- A clause is a field, an operator, and one or more values or functions.
- Without parentheses, JQL is evaluated left to right.
- Autocomplete shows only the first **15** matches and none for function parameters.
- A query with OR will not translate to basic search, but the IN form will.

Sources: What is advanced search in Jira Cloud? | Jira Cloud | Atlassian Support (opens in a new tab) · Search for custom fields from plans in JQL | Jira Cloud | Atlassian Support (opens in a new tab)

Configure filters, dashboards, subscriptions

Start here

THINK FIRST

Who can share a filter or subscribe a group to it, and why might two people see different results from the same filter?

Why it matters: Questions describe a sharing or subscription problem and ask which permission, setting or behavior explains it.

Sharing and group subscriptions are controlled by global permissions. Subscriptions rerun the search for each recipient, so results can differ from person to person.

Key terms

Term	Meaning
Global permission	A site-wide permission, such as the one for sharing dashboards and filters.
Filter subscription	A scheduled email of a saved filter's results, sent to you, other users or a group.
Cron expression	A string of fields that sets a custom schedule when you choose Advanced.
Public sharing	A site-level setting that lets users share filters and dashboards with the public.

Permissions behind sharing

Sharing needs the Share dashboards and filters global permission. Viewing, granting and revoking global permissions needs Administer Jira. They can be granted to groups the Organization admin created. A user who cannot see a filter's sharing options needs Create Shared Object.

Global permissions for filters and subscriptions

Permission	What it allows	Watch out for
Share dashboards and filters	Share with other users	Only when they have permission to view it
Manage group filter subscriptions	Create and delete group subscriptions	You must also belong to the group
Create Shared Object	See a filter's sharing configuration	A Jira admin has to grant it

Creating shared filters

Share your filters with groups, spaces, space roles or globally. You can share only with groups or roles you belong to. Anyone with Administer Jira can see every shared filter.

EXAM TRAP

Public means the internet. A filter shared publicly is visible and searchable by anyone online.

Public sharing at site level

A Jira admin must allow public sharing before anyone can use it. Turn it on under Options in General configuration. Allowing it shares nothing by itself. Standard, Premium and Enterprise sites can share publicly; Free sites cannot. Settings, System, then Filters or Dashboards lists what is shared with the public.

EXAM TRAP

Turning public sharing off does not unshare anything already public. Change who can view each filter or dashboard instead.

Setting up a subscription

Save the search as a filter first, then subscribe. Subscriptions can run at any frequency, for you or others. Each email holds only the first **200** results. Choose Advanced to schedule with a cron expression. Send subscription emails as HTML, because plain text can look broken.

Cron expression fields, left to right

Position	Field	Note
First three	Second, Minute, Hour	Time of day
Next three	Day-of-month, Month, Day-of-week	Use ? in one day field when the other is set
Last	Year	Optional

Groups and currentUser()

Each recipient gets results evaluated as themselves. A filter using `currentUser()` runs with the recipient as the current user. That does not apply to distribution lists, meaning group email aliases. Because the search runs per user, a large group can make emails slow to generate.

EXAM TRAP

To pick a group as recipient, holding Manage Group Filter Subscriptions is not enough. You must also be a member of that group.

Dashboards

New users first land on the default dashboard. After you create a custom dashboard, the default one may vanish from the header menu. That menu lists only favorite dashboards. Dashboards can refresh automatically at a frequency set in minutes.

Key takeaways

- Sharing needs Share dashboards and filters; group subscriptions need Manage group filter subscriptions.
- Subscription results are evaluated per recipient, so `currentUser()` gives each person their own results, except for group email aliases.
- A subscription email includes only the first **200** results of the filter.
- Public sharing must be allowed at site level, and Free sites cannot share publicly.

Sources: What are global permissions, and what do they control? | Atlassian Support (opens in a new tab) · Manage filters | Jira Cloud | Atlassian Support (opens in a new tab) · Types of permissions in Jira | Atlassian Support (opens in a new tab) · Allow dashboards and filters in your site to be shared publicly | Atlassian Support (opens in a new tab) · View, grant, revoke global permissions in Jira | Atlassian Support (opens in a new tab) · Manage filters | Atlassian Support (opens in a new tab) · View which filters and dashboards are shared publicly in your site | Atlassian Support (opens in a new tab) · Configure dashboards | Atlassian Support (opens in a new tab)

Understand bulk operations

Start here

THINK FIRST

What do you lose, and what do you keep, when you bulk move work items from a company-managed space to a team-managed one?

Why it matters: Questions describe a bulk move between space types and ask what happens to fields, sprints and reports.

A bulk move walks you through picking work items, a destination and values for required fields. Moving between company-managed and team-managed spaces is where data goes missing, because the two space types store fields differently.

Key terms

Term	Meaning
Bulk change	The option that applies one operation, such as Move work items, to many work items at once.
Global custom field	On a move to team-managed, most of its values stay, except component and version, but are not mapped.
Story point estimate	The team-managed estimation field; company-managed spaces use a different field called Story points.
Work item key	The identifier Jira updates to the new space after a move, with old links redirected.

Running a bulk move

Start from More actions, then Bulk change work items. Choose the work items and select Move work items. Next, pick a destination space and work type. Then fill in any required fields and, when offered, decide whether to send email notifications.

EXAM TRAP

A bulk move cannot skip required fields. You must give each required field a value before the move continues.

Who can migrate work

Moving work between space types needs a space admin. That role needs both the Administer spaces and Browse spaces permissions. There is no built-in way to turn a team-managed space straight into a company-managed one.

EXAM TRAP

Do not look for a convert option: Jira has no native feature that turns a team-managed space into a company-managed one.

Keys and custom fields

Keys update automatically; global field values stay but look blank. Links to the old keys redirect to the new ones. Most global custom field values are kept but not mapped to team-managed fields, so they show as blank. Move the work back to a company-managed space that supports the field, and the values reappear.

What a move to team-managed loses

Components, versions, estimates, sprints and report history do not survive. Questions often list one of these and ask whether it carries over. Plan for each loss before you move work out of a company-managed space.

Data lost when work moves from company-managed to team-managed

Data	What happens	Worth knowing
Components	Field data is lost	Not recoverable, even if you move the work back
Versions and releases	Version data is lost	Lost even with Releases and versions turned on
Story points	Estimates are lost	Turn on Estimation to start estimating again
Sprints	Sprints do not move	Moved work items land in the team-managed backlog
Report history	Velocity and Burnup history is lost	All reporting history is dropped

EXAM TRAP

Turning on Releases and versions in the team-managed space does not save version data. It is lost either way.

Moving the other way

Estimates are also lost when work moves into company-managed. Company-managed spaces keep estimates in Story points, while team-managed spaces use Story point estimate. Because the fields differ, the estimate data does not carry over.

Board limits after a big move

Company-managed boards and backlogs show up to 5,000 work items at a time. A filter itself has no item limit. Past the limit, a company-managed board shows the first **5,000** items, which people can still view and edit. To shrink a team-managed backlog, move work items to a sprint or to a new space.

Key takeaways

- Component and version data lost in a move to team-managed cannot be recovered by moving back.
- Global custom field values look blank in team-managed spaces but return when moved back.
- A bulk move asks for required field values and, when offered, whether to send notifications.
- Sprints do not move; the work items land in the team-managed backlog.

Sources: Migrate between team-managed and company-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Work item limits in company-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Work item limits in team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab)

Domain 7 | 9% of the exam | 13 min read

System Administration

Overview

This domain is about 9% of the exam, roughly 5 of its 60 questions.

Every point below comes from Atlassian's official documentation; each section lists its sources.

Configure global user interface features

Start here

THINK FIRST

When a Jira admin changes a site-wide default, which users and objects actually change, and what stays the same?

Why it matters: Questions describe a site-wide change and ask who it affects, what limit applies or which setting the admin should use.

Admins set site-wide defaults, and each user can then adjust their own copy. Defaults apply when something is created, so existing accounts keep their choices. Look and feel, banners and the default dashboard shape what everyone sees.

Key terms

Term	Meaning
User default settings	Site-wide preferences applied to each user account when it is created.
Personal settings	Each user's own choices, such as language, timezone, watch settings and email type.
Announcement banner	A site-wide message that a Jira admin creates to communicate with users.
Default dashboard	The dashboard users see the first time they log in to Jira Cloud.

Defaults versus personal settings

Defaults apply when an account is created; users can change them later. So changing a default does not overwrite the choices existing users already made in their profile. Public and anonymous users cannot log in to manage settings, so they inherit the site defaults.

EXAM TRAP

An admin can lock Email format by selecting Apply. Users then cannot edit that setting in their profile.

Changing user defaults

You need the Administer Jira global permission. Open Settings, then System, then Default user preferences. Work items per page takes a value from **1** to **1000**. Default access decides whether new filters and dashboards are Public or Private.

EXAM TRAP

Default access affects new filters and dashboards only. Filters and dashboards that already exist keep the access they were created with.

What users control themselves

Users set their own language, timezone, watch settings and email type. If their chosen timezone differs from their computer's, Jira offers to update it automatically. They can also review and manage apps that can reach their Jira account.

Look and feel limits

Logos, favicons and date formats have fixed rules. The favicon and logo have exact size rules worth memorizing. Date and time formats follow Java SimpleDateFormat.

Look and feel requirements to remember

Item	Requirement	Extra detail
Favicon	PNG, **32x32** pixels	**71x71** DPI and **8-bit** color depth
Site logo	Height constrained to **30** pixels	Recommended width of **57** pixels
Date and time formats	Based on Java SimpleDateFormat	Set in Look and feel

Announcement banners

Only a Jira admin can create or change a banner. A message can hold up to **650** characters, emojis included. The audience defaults to Private, meaning internal licensed users only. The dismiss toggle is off by default, so the banner stays put.

EXAM TRAP

A banner is not dismissible unless you turn its toggle on. By default viewers cannot close it.

Modifying the default dashboard

Admins can change its gadgets and layout, but cannot delete it. Share it with the organization or the public. You cannot share it with specific groups, spaces or people.

EXAM TRAP

Sharing the default dashboard with one group is not possible. The only choices are the organization or the public.

Key takeaways

- User defaults apply at account creation; users can then change them in their profile.
- Changing user defaults needs the Administer Jira global permission.
- Banners default to Private audience and cannot be dismissed unless you allow it.
- The default dashboard can be edited but never deleted.

Sources: Configure the user default settings | Atlassian Support (opens in a new tab) · Manage your Jira personal settings | Jira Cloud | Atlassian Support (opens in a new tab) · Configure global settings | Atlassian Support (opens in a new tab) · Configure dashboards | Atlassian Support (opens in a new tab) · Configure announcement banners | Atlassian Support (opens in a new tab) · Configure the look and feel of Jira apps | Atlassian Support (opens in a new tab) · Configure the default dashboard | Atlassian Support (opens in a new tab)

Configure attachments, issue links, app links, time-tracking globally

Start here

THINK FIRST

When users cannot log time, attach a file or link work, which global setting, field or permission should you check first?

Why it matters: Questions describe a user who cannot track time, attach or link, and ask which setting, field or permission is missing.

Attachments are on by default, and time tracking is always on in Jira Cloud spaces. You control time tracking through its field, and an admin activates work item linking. Users also need the matching permission, such as Link Work Items or Work On Work Items.

Key terms

Term	Meaning
Time Tracking field	The field that lets people enter estimates and log time on a work item.
Work On Work Items	The space permission people need to log time on work items.
Link type	A named relationship with an outward and an inward description, such as causes and is caused by.
Wiki Style Renderer	The field renderer needed to create links in Jira that point to other apps.

Time tracking is on; control the field

You control time tracking by showing or hiding its field. In Jira Cloud, every space has time tracking switched on. Company-managed spaces show or hide the Time tracking field in field configurations. Team-managed spaces add or remove it on their work types.

EXAM TRAP

Original estimates need the Time Tracking field on the create and edit screens. Without it there, people cannot enter an estimate.

Global time tracking settings

Working hours and days per week both accept decimal values. The Default unit (Minute, Hour, Day or Week) applies when someone logs time without a unit. A Marketplace app can act as the time tracking provider, and its data might be stored with the app developer.

Estimation in team-managed spaces

Estimation is off by default in team-managed spaces. Turn it on in Space settings, then Features, and choose Story points or Time. On a company-managed board, Remaining estimate and time spent subtracts Time spent from the original estimate.

Troubleshooting with worklog permissions

Logging time needs Work On Work Items plus Browse spaces. Work On Work Items can only go to users an admin invited. Editing worklogs has separate permissions for your own entries and for anyone's entries. Delete all worklogs lets users delete anyone's entries.

Worklog permissions and what they allow

Permission	Allows	Whose entries
Edit own worklogs	Edit work log entries	Only your own
Edit all worklogs	Edit work log entries	Anyone's
Delete all worklogs	Delete work log entries	Anyone's

Work item linking

A Jira admin activates linking; users need Link Work Items. Each link type has a name, an outward description and an inward description. A JQL search on `workitemLinkType` checks all three. Closed work items are missing from the link search dropdown, so type their exact key.

EXAM TRAP

Leave clone link types alone. Jira uses them to link cloned work items automatically. When you delete any other link type, you can move its links to another type or remove them.

Links to other apps

Links to other apps need fields using the Wiki Style Renderer. The Comment and Description fields are typical examples. If a field uses another renderer, people cannot create links in it that point to other apps.

Attachments

Attachments are enabled by default. Attaching needs Create Attachments, and deleting your own files needs Delete Own Attachments. The default file limit is **1** GB, with a maximum of **2** GB per file. Enable ZIP Support lets people preview ZIP files and download every attachment as **1** file.

EXAM TRAP

If the Attachment field is hidden in the field configuration, people cannot attach a file while creating that work type.

Key takeaways

- Time tracking is always on in Jira Cloud; show or hide the Time tracking field to control it.
- Logging time needs Work On Work Items and Browse spaces.
- Linking needs an admin to activate it and the Link Work Items permission for users.
- Attachments default to **1** GB per file, up to a maximum of **2** GB.

Sources: Configure file attachments | Atlassian Support (opens in a new tab) · Configure time tracking | Atlassian Support (opens in a new tab) · Configure work item linking | Atlassian Support (opens in a new tab) · Time tracking permissions | Atlassian Support (opens in a new tab) · Administer spaces and links across multiple apps | Atlassian Support (opens in a new tab) · Configure how your board estimates and tracks work | Jira Cloud | Atlassian Support (opens in a new tab)

Configure statuses, resolutions, priorities and sub-tasks globally

Start here

THINK FIRST

What really changes across Jira when you rename, add or delete a status, resolution or priority?

Why it matters: Questions describe a change to a status, resolution or priority and ask what else it affects.

Statuses and priorities are shared values. Workflows share statuses, and priority schemes attach priorities to spaces. Changing a shared value can ripple into every place that uses it, so ask where else it is used first.

Key terms

Term	Meaning
Shared status	A status used by more than one work type or workflow in a team-managed space.
Any status transition	A global transition that lets work items in any other status move into a status.
Priority scheme	The scheme that links a set of priorities to particular spaces.
Resolution	A work item value that is usually set when its status changes; admins may customize the list.

Who manages statuses

Team-managed statuses need the Administrator role. That role carries the Administer spaces permission. You change statuses by editing a work type's workflow in space settings, or by managing columns on the board.

What a new status does

A new status accepts work items from any other status. The Any status label marks this global transition. By default the new status is also not assigned to a board column, so the board does not show it yet.

EXAM TRAP

A new status is not on the board automatically. Until you assign it to a column, work items in it stay out of sight on the board.

Renaming a shared status

Renaming a shared status changes it in every workflow using it. Jira updates both the name and the category everywhere in the space. To rename it for one workflow only, choose to change it for these work items only.

Two ways to rename a shared status

Feature	Rename for all	For these work items only
What Jira changes	The shared status itself	A copy made for the workflow you are editing
Other workflows	Show the new name and category	Keep using the original status

Deleting and limits

Deleting a status also deletes its transitions and their rules. It only removes the status from the workflow you are editing. A team-managed space allows **100** statuses across all workflows, and **50** in any one workflow.

EXAM TRAP

Deleting a shared status in the workflow editor does not delete it everywhere. Other workflows that share it keep it.

Priorities

Jira ships five default priorities, from Highest to Lowest. They are Highest, High, Medium, Low and Lowest. Admins can modify them, create new ones, and attach them to spaces through priority schemes. Configuring them needs the Administer Jira global permission.

Resolutions

A resolution is usually set when the status changes. Jira fills the resolved date when Resolution moves from Unresolved to a value. With custom screens, set Resolution only when work moves to a Done status.

EXAM TRAP

Setting Resolution on a transition that is not Done gives the work item a resolved date too early. That undermines accurate reporting.

Translated names

Statuses, resolutions, priorities and work types can be translated. Translations need the Administer Jira global permission. They appear in reports, gadgets and all work item views. Without a translation, Jira shows the default name and description.

Subtasks in team-managed spaces

Subtasks need the subtask work type in the space. If the space lacks it, you add it before anyone can create subtasks. Only space admins can then group the board by Subtask.

Key takeaways

- Renaming a shared status updates its name and category in every workflow of the space that uses it.
- A new team-managed status is not on the board until you assign it to a column.
- Deleting a status removes its transitions and rules, but only from the workflow you edit.
- Jira's default priorities are Highest, High, Medium, Low and Lowest.

Sources: Create, edit and delete statuses in team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab) · Configure priorities for spaces | Atlassian Support (opens in a new tab) · What are work item statuses, priorities, and resolutions? | Atlassian Support (opens in a new tab) · Configure resolutions in a Jira workflow | Atlassian Support (opens in a new tab) · Translate resolutions, priorities, statuses, and work types | Atlassian Support (opens in a new tab) · Manage subtasks in team-managed spaces | Jira Cloud | Atlassian Support (opens in a new tab)

Understand system backup and import

Start here

THINK FIRST

When should you restore a full cloud backup instead of importing work from a CSV file or another tool, and what do you check afterward?

Why it matters: Questions describe a migration or an import and ask which method, file or permission fits the situation.

Data can come in through space imports from CSV files or other tools, or through restores of a cloud backup. Most space imports need only permission to create work in the target space. A restore overwrites the site's database, so splitting the backup is recommended, and imported users need app access afterward.

Key terms

Term	Meaning
Backup file	An export of a Jira Cloud site, produced by following the steps for exporting work items.
Data files	`entities.xml` and `activeobjects.xml` in a backup; importing them replaces the site's database.
Application access	The right to use a Jira app; imported users need it granted before they can sign in.
User merge	An import joins imported users with matching cloud users, which can widen their access.

Preparing the backup

Split the backup into 2 files: data and media. Put `activeobjects.xml` and `entities.xml` in the data file, and attachments and other media in the second file. This split helps you avoid timeout errors during the import.

Restoring the backup

Start the restore from Settings, then System, then Import Jira Cloud. The data files overwrite the site's whole database. Attachments, avatars and logos in the backup also replace the ones already on the site.

EXAM TRAP

A restore is not a merge of work items. Importing the data files overwrites the existing database, so current site data is replaced.

Users after a restore

Imported users get no app access until you grant it. The import ignores the default application access settings. It also merges imported users with existing cloud users, which can add access or permissions. Check which groups those users will join.

> **EXAM TRAP**
> Default application access settings do not apply to imported users. Without a manual grant, they cannot sign in.

Admin permission after a Data Center import

Changes to Administer Jira do not carry over from Data Center. Other global permissions, such as Browse users and groups, do come across. After the import, add the right groups and users to Administer Jira yourself.

Data Center versions

Version 7.6.0 or later migrates without an upgrade. An instance older than **7.0.0** must first be upgraded to **7.6.0** or later before you migrate.

CSV file rules

Every CSV needs a header row with a Summary column. Enter time tracking values in seconds, so **1** hour becomes **3600**. List parent work items before their subtasks or child work items in the file.

Key takeaways

- Most imports need only permission to create work in the target space, not org admin rights.
- Restoring the backup's data files replaces the site's database.
- Split a cloud backup into a data file and a media file to avoid timeouts.
- After a restore, grant app access to imported users. After a Data Center import, add groups and users to Administer Jira as needed.

Sources: Import data into Jira | Jira Cloud | Atlassian Support (opens in a new tab) · Import work items | Atlassian Support (opens in a new tab) · Import data from a CSV file | Atlassian Support (opens in a new tab) · Fix errors in a space import | Jira Cloud | Atlassian Support (opens in a new tab)

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