

# How to streamline tasks and keep teams in sync



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A Jira admin's guide

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# Introduction

Jira. The tool that so many admins love and sometimes struggle with.

At first, it seems manageable – just a few tickets here and there. But as your organization grows (hopefully), you find yourself buried under a flood of notifications, trying to stay afloat.

Sound familiar?

Jira is an incredible tool for project management, but as teams expand, keeping everything in sync can become a major challenge. You might find yourself updating the same information across multiple systems while juggling more projects, users, and workflows than ever.

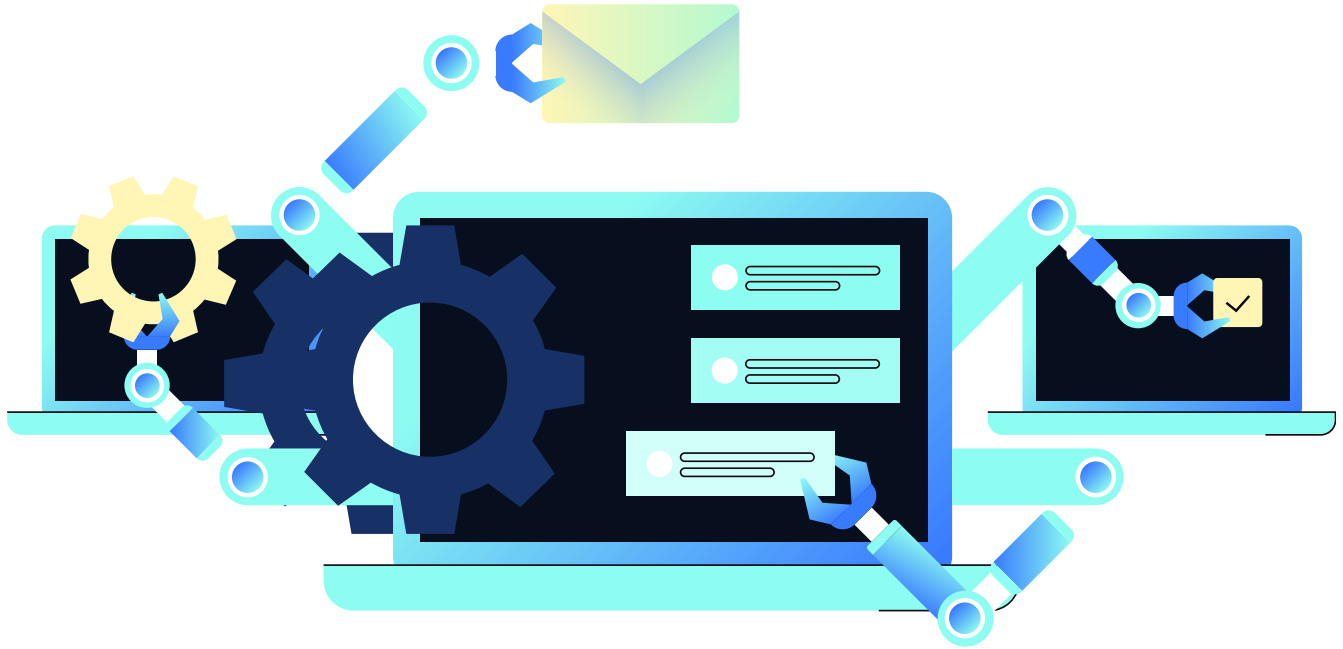
That's why we put this guide together – to help you automate your Jira processes so you can streamline daily tasks and keep your teams aligned. **With the right automation strategies, you can** reduce manual effort, cut down on errors, and free up time for more meaningful work.

Want to get more out of Jira while saving your team **hundreds of hours**? You're in the right place.

## What you'll learn in this guide

In the following pages, you'll discover how to:

- Keep data in sync across Jira and other systems
- Automate ticket assignments to alleviate bottlenecks and reduce costs
- Use bulk operations to standardize processes
- Minimize manual errors and improve data accuracy
- Conduct smarter searches in Jira



Jira isn't perfect (nothing is!), but its flexibility allows admins to **customize and optimize processes** in powerful ways. With a bit of creativity and the right automation apps, you can take your Jira administration to the next level.

So, let's get started! Try out these tips today and see the difference they make. And don't forget to **download the Jira admin's checklist for automating Jira** at the end of this guide: It's a step-by-step plan to help you create automation rules that boost productivity and keep your team in sync.

# Scaling means trouble – if you're not ready



**Great news:** Your organization is growing.



**Not-so-great news:** The bigger you get, the messier things can become.

What worked when your team was smaller might not hold up. Processes that used to run smoothly can start to feel **messy and inefficient**, resulting in **manual errors, duplicated data, and inconsistent workflows**.

## Why automation is a must-have, not a nice-to-have

At some point, every growing business runs into the same roadblocks:

- **Too many repetitive tasks** that slow teams down
- **Manual errors** that cause confusion and extra work
- **Data scattered across multiple systems** instead of staying in sync
- **Workflows that don't scale**, leading to bottlenecks and frustration

Instead of just cutting down on manual work, modern automation helps **connect processes, reduce errors, and keep everything running smoothly** so your team isn't stuck fixing the same problems over and over. (And over.)

According to [Deloitte's Digital Transformation Survey](#), automation plays a **key role in helping businesses scale the right way**. Their research highlights **intelligent workflows**: Automation-driven processes that eliminate repetitive tasks and enable smarter, data-driven decisions. The result is a **smoother, more connected operation** that supports everything from flexible infrastructure to a better customer experience.

With the right automation in place, you can spend less time on tedious updates and more time on the work that actually moves your business forward.

# Why automation in Jira is your best bet

Automation isn't just about saving time; it's about making Jira *work for you*. When used effectively, automation **eliminates repetitive tasks, reduces errors, and keeps work moving smoothly**. Here's how it can help:

## 1. Keep data in sync

Make sure information stays up to date across Jira – and even across your entire tech stack. No more mismatched statuses or missing updates.

## 2. Remove manual errors

Reduce mistakes by ensuring that data is updated consistently and accurately, without relying on manual input.

## 3. Alleviate bottlenecks

Prevent delays by automating key steps in your workflows, ensuring that work moves forward without unnecessary holdups.

## 4. Do things in bulk

Save yourself and your team hours by automating bulk actions, so you can complete hundreds of tasks in just a few clicks.

### Is this guide for you?

If you work with Jira – whether you're a seasoned admin or just getting started with automation – this guide is for you.

We've put together **useful tips and automation strategies** to help you cut down on busy work and keep your team focused on what really matters.

# 1. Keep your data in sync

Keeping data in sync is critical for maintaining **accuracy, efficiency, and smooth collaboration** – not just in Jira, but across all your systems.

Even small inconsistencies can cause **delays, miscommunication, and errors**. It only takes one person updating a task in one place but forgetting to do it elsewhere to create confusion. Now, imagine that happening across an entire project.

The good news? Automation can handle it for you. In this section, we'll cover how to **keep your issues, attachments, and workflows aligned** so your team always has the most up-to-date information.

## Automatically close parent or associated issues

Keeping issues aligned ensures accurate reporting and prevents outdated information from piling up.

### Common problem in project syncing

Picture this: all the child issues in a project are closed, but the parent issue is still sitting open because **no one remembered to update it**. Or the opposite – the epic is marked as done, but lingering tasks and stories are still hanging around.

### What's the goal?

- Automatically close the parent issue once all child issues are resolved.
- Ensure that completed or unnecessary issues transition to their final status.
- Prevent an overloaded instance full of outdated issues that were never manually updated.


## How to solve it

Automation makes it easy:

- Close the parent issue when all child issues are marked as done.
- Automatically transition completed issues to their final status.

Jira's built-in automation can handle simple use cases, but if you need more flexibility, third-party apps can extend functionality with additional triggers, actions, and conditions.

## A simple, no-code way to extend Jira workflows

Want to automate without scripting? Apps like  [JSU Automation Suite for Jira Workflows](#) let you build **powerful, no-code automation rules** with flexible post functions and conditions.

With just a few clicks, you can:

- Auto-close parent issues when child issues are resolved
- Keep epic statuses updated to reflect completed work
- Apply workflow rules that **reduce manual updates and errors**

Check out  [JSU in action](#) to see how quickly you can build your first automation.

## Keep your instance clean, automatically

Ever noticed that closed **epics still show up on your backlog**? That's because epics have a separate **epic status field**, which isn't updated when you close an issue.


To **keep your backlog clean**, [you can automate this step](#) so that epics marked "done" are removed from the backlog automatically.

JSU makes this easy: Set up an automation rule once in your Jira workflow, and it will run automatically whenever the conditions are met.

## Automatically close or reopen other issues

Automation isn't just about **closing tasks** – it can also help ensure **timely follow-ups** and better customer support. Here are a few ways you can use automation to **improve issue management**:


- **Close stale tickets** if no response is received within a set timeframe.
- **Auto-resolve issues** when a comment includes words like “complete” or “resolved.”
- **Reopen closed issues** if a customer replies to a ticket saying the problem isn't fixed.
- **Transition issues to 'done'** when a sprint is completed.
- **Reopen a closed issue** if a key team member leaves a new comment.

If you work with automated deployment tools like Gitlab, Github, or Jenkins, you can even trigger build and deployment automation directly from Jira using webhooks. Scripting apps like  [Power Scripts](#) give you full flexibility to set up custom webhooks based on specific conditions.

## Automatically copy attachments between issues

Some projects require key **files and documents** to be available in multiple issues. Instead of manually uploading the same file over and over, you can **automate file transfers** between related tasks.

For example:

- **Copy brand guidelines** from a parent issue to all subtasks, so everyone has easy access.
- **Automatically attach key documents** to related issues as they're created.
- **Restrict file access** based on user roles with apps like  [Power Scripts](#).

## Give file access to team members

Let's say your team is working on brand guidelines for your organization. You upload the creative brief to the parent issue and create subtasks for different team members.




Even though the issues are linked, you want to make sure everyone has direct access to the brief without digging through parent issues.

### Automation can help:

- Copy attachments from a parent issue to all subtasks automatically.
- Ensure every new subtask gets the file without extra manual work.
- Keep documents accessible to the right people, even if they don't have direct permissions on the parent issue.

See how it's done using a [simple post function in JSU](#).

### Tip for Jira admins

Need an extra layer of security? Using  [Live Fields](#) with  [JMWE \(Jira Misc Workflow Extensions\)](#) or  [Power Scripts](#), you can restrict field visibility based on user roles, meaning **sensitive information is only accessible to the right team members**.

## Synchronize software versions across internal and external projects


Many teams manage two separate Jira projects:

- **External project:** Where customers report bugs and request new features.
- **Internal project:** Where the development team tracks and resolves issues.

This setup helps with **triaging customer requests** before they enter the internal backlog, keeping Jira clean and organized.

To keep both projects in sync, you can set up an **automation rule** that:

- **Creates a corresponding version in the public project** whenever a new software version is released internally.
- **Ensures customers always report issues against the correct version.**

Taking it a step further,  [Power Scripts](#) can help you synchronize issue attributes across projects with custom rules and scripts. That way, when a status changes, a comment is added, or a field is updated in one project, the same update will automatically be applied to linked issues based on your specific conditions.

## Take your synchronization processes up a level

Once you have the basics covered, you can explore more advanced automation rules to keep your Jira instance running smoothly. These additional automations help **reduce manual work, improve data accuracy, and ensure everything stays in sync.**

Here are some ways to take your automation further:

### Keep epic estimates and child issues in sync

If you track estimates at the **epic level**, you'll want to ensure they **stay accurate** as the underlying tasks evolve. Automatically update the **original estimate** in an epic whenever estimates change in linked child issues to prevent discrepancies between **high-level planning** and **actual task execution**.

### Automatically update all stories within a sprint

Managing sprints in Jira can be **time-consuming** when updates need to be made across multiple issues. Sync **due dates** for all sprint issues to match the sprint's end date so when the sprint timeline shifts, **all associated tasks adjust automatically.**

## Update version releases for sprint issues

Manually updating **release versions** across multiple sprint issues is tedious and prone to mistakes. Set up an automation rule to **apply the correct release version** when a sprint is completed to keep your version tracking clean, accurate, and up to date.

## Transition issues when a code review is rejected

Code reviews are a critical part of **software development workflows**. If a review is rejected, the associated tasks should reflect that status. Automatically transition an **epic and all related issues** back to the appropriate workflow stage if a code review fails to ensure developers know exactly which issues need further work before merging.

## Keep watchers and reporters in sync across issues

When issues are duplicated or broken into subtasks, key stakeholders can **miss out on important updates** unless they're manually added. **Automate this step** by:

- **Copying watchers and the reporter** from a duplicate issue to the original, ensuring everyone stays informed.
- **Syncing watchers from a parent issue to its subtasks** so team members stay in the loop at every level of the workflow.

This way, no one has to chase down updates or manually add watchers.


## Automatically update custom field IDs and names in filters

Changing a **custom field name or ID** in Jira can be a headache, especially when it's referenced in **multiple filters, dashboards, and reports**. Automate the update process to ensure **all saved filters, dashboards, and agile boards** reflect the latest field name or ID to avoid broken filters and missing data due to **manual oversights**.

## Send email notifications using scheduled actions


Automated email notifications can help keep teams on track and **make sure important updates aren't missed**. With **scheduled actions**, you can:

- **Send reminders** to assignees for issues that are still “**In Progress**” at a specific time each day.
- **Trigger follow-up emails** when a task hasn’t been updated within a set timeframe.
- **Schedule status update emails** for key stakeholders at regular intervals.

Apps like  [JMWE](#) allow you to **automate recurring notifications** – for example, sending a daily summary of overdue tasks at 9 a.m. This ensures **no critical work slips through the cracks**.

### Real-world impact: How Fineos streamlined issue management with automation



FINEOS, a leader in core systems for insurance, needed a way to keep their Jira issues in sync across multiple teams while improving efficiency.  JMWE let

them automate status updates, issue transitions, and notifications, reducing manual effort and ensuring key stakeholders always had up-to-date information.

With these automation improvements, FINEOS accelerated issue resolution, reduced bottlenecks, and improved collaboration – all while keeping their Jira workflows running smoothly.

[Check out the full story.](#)

## Synchronize data across your tech stack

Jira is just one piece of your **business operations**. To keep all your programs working together, you need seamless integrations.

With automation, you can:

- **Sync Jira with Salesforce** to keep customer tickets up to date.
- **Integrate Jira with BI tools** for better reporting.
- **Use Jira's REST API** to connect with external apps.

Apps like  [Jira Command Line Interface \(CLI\)](#) and  [Power Scripts](#) help teams **build integrations** across Atlassian and third-party products **without complex development work**.

Real-world impact: How Cprime automated workflows to accelerate customer requests



A global consulting firm, Cprime, faced challenges managing customer quotes across multiple tools. They needed a faster way to track and process requests.

By integrating Salesforce and Jira using Power Scripts, they:

- **Streamlined ticket handling** – reducing turnaround time from **hours to minutes**.
- **Eliminated manual data entry** – ensuring real-time updates between teams.
- **Kept business and IT teams aligned** – improving collaboration across the company.

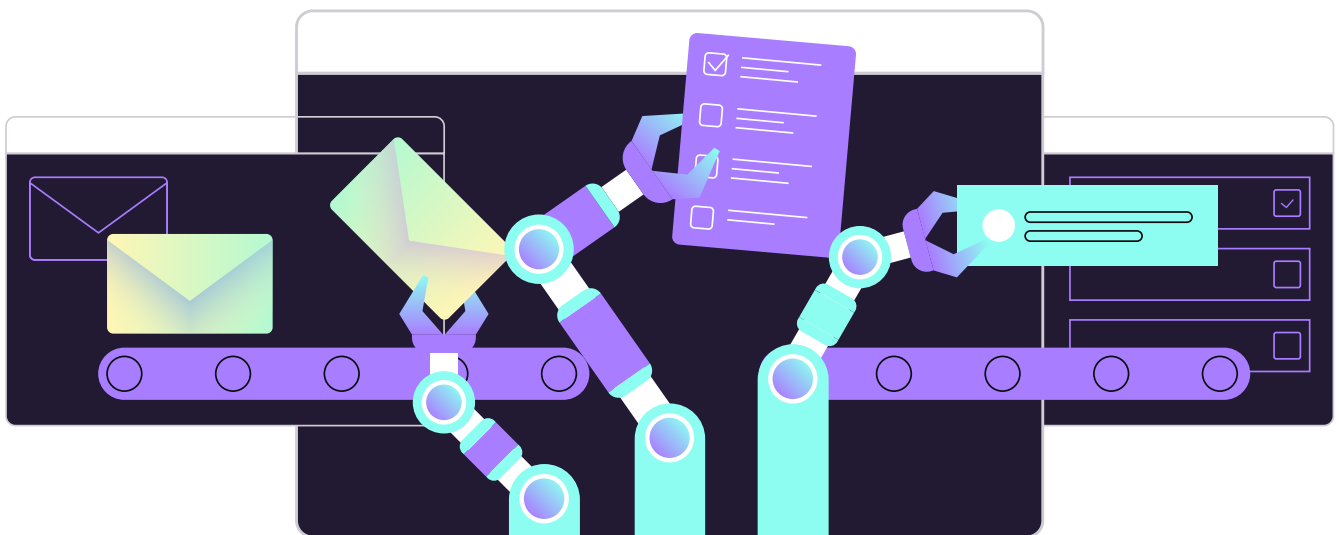
The result? A more efficient, error-free workflow that saved the team valuable time. [Read the full success story.](#)

## Why these automations matter

By implementing these advanced synchronization rules, you'll:

- Reduce **manual data entry** and **eliminate common errors**.
- Ensure **consistency across related issues and sprints**.
- Keep **team members aligned** with real-time updates.
- Improve **visibility into key projects** without extra effort.

The more you automate, the **less time you spend on administrative work**—and the more time you have to focus on strategy, problem-solving, and delivering results.



## 2. Remove manual errors

Mistakes happen – but in Jira, even small errors can waste time, cause confusion, and lead to inaccurate reports.

Data inconsistencies, typos, and missing updates can slow teams down. The best way to **keep your data clean and reliable** is to **prevent errors before they happen**.

By automating repetitive tasks, you can **eliminate human errors, improve data accuracy, and reduce the need for tedious double- and triple-checking**.

### Update a single data point in multiple places

A common frustration for teams is having to **manually update the same piece of information across multiple locations**.

For example, if a team member updates a **project deadline**, that change may need to be reflected in:

- The project's **Jira issues**
- **Dashboards and reports**
- **Other linked tickets**

Manually keeping everything up to date is time-consuming – and easy to **forget**.

#### How automation helps:

- Automatically update **all linked issues** when a key date or field is changed.
- Ensure that **reports and dashboards always reflect the latest data**.
- Reduce **duplicate work and inconsistencies** across projects.

By setting up **automation rules**, your Jira instance will always reflect the most accurate information – without requiring extra effort from your team.

## Four of the most valuable automations in Jira

We asked **industry experts and members of the Appfire community** to share their most valuable automations. Here are four that can **save your team significant time and effort**:

### 1. Get instant alerts when an app goes down

- Automate an email or Slack notification whenever an app outage is detected.
- Keep teams informed before users start reporting issues.

### 2. Sync external tools with Jira via webhooks

- Use REST API and webhooks to automate data transfers between Jira and other tools.
- Great for integrating Jira with project management, CRM, and reporting platforms.  
[Take a look at how Power Scripts can help with this.](#)

### 3. Auto-provision new user accounts

- New employee? Automate account creation in Jira Service Management.
- Link with HR systems so accounts are provisioned as soon as a new hire is onboarded.

### 4. Automate password resets

- Trigger password resets automatically for Jira and related tools.
- Reduce IT support requests and help users get back to work faster.

## Automate actions based on field selection

When a **help desk technician** triages support tickets in Jira Service Management, they often **classify issues manually**.

For example, some tickets might need **escalation**, while others require an **automated response**. If all options are placed in a single dropdown menu, it can **easily become overwhelming**.

### How automation helps:

- **Simplifies issue classification** by dynamically adjusting dropdown options.
- **Automatically triggers actions** based on selections, reducing human error.
- **Routes tickets correctly** without requiring manual triage.

 [JMWE](#) allows you to configure these rules **quickly and easily** with a mix of no-code and low-code.

#### Tip for Jira admins

Use [JMWE's shared actions feature](#) to create reusable automation rules for multiple workflows.

## Automate on-the-fly calculations in Jira

Jira provides many built-in **fields for tracking data**, but it doesn't support **automated calculations** out of the box.

For example, what if you want to:

- Automatically calculate work cost estimates?
- Convert expenses into different currencies?
- Track time spent on issues based on work logs?

### How automation helps:

- Automate **custom calculations** using apps like [Jira Misc Custom Fields \(JMCF\)](#) or [JSU](#). [See how.](#)
- Reduce **manual number crunching** and **eliminate errors**.
- Generate **more accurate reports** with **real-time calculations**.

Instead of relying on **spreadsheets or manual tracking**, let Jira handle calculations directly.

## Why these automations matter

By reducing **manual errors and redundant data entry**, these automations help your team:

- Save **time** by eliminating repetitive updates.
- Improve **data accuracy** across projects.
- Reduce **frustration** by keeping everything in sync automatically.

The fewer errors in your system, the less time admins spend firefighting – **fewer messy fixes, fewer disruptions, and a Jira instance that runs smoothly without constant cleanups.**

## 3. Alleviate bottlenecks

Bottlenecks slow teams down – whether it’s waiting for approvals, searching for missing information, or dealing with ticket assignments that take too long.

When work gets stuck, productivity suffers. The good news? **Automation can keep things moving.**

By automating ticket assignments, escalations, and prioritization, you can **eliminate bottlenecks, speed up processes, and help your team stay focused on high-value work.**

### Five ways to increase your team’s productivity

Here are five Jira use cases that can help you **assign tickets more effectively and remove workflow roadblocks:**

#### 1. Use components to auto-assign tickets

- Automatically **route infrastructure-related issues** to the right team member.
- Assign tickets based on **predefined categories** to avoid manual triage.

#### 2. Prioritize urgent requests automatically

- Assign issues marked as **high priority** directly to the **appropriate team member**.
- Use keywords like **“urgent” or “critical”** to escalate tickets automatically.

#### 3. Balance workload across your team

- Assign new tickets **based on availability**, ensuring work is distributed evenly.
- Prevent burnout by **rotating assignments when someone’s workload is too high.**

#### 4. Auto-assign based on expertise

- Route tickets to the **right person based on their skills or location**.
- Assign **security-related issues** to the security team, **UX requests** to designers, and so on.

#### 5. Automate escalations based on issue status


- If an issue is **stuck in review too long**, escalate it automatically.
- Send notifications to a **manager** when a deadline is missed.

By implementing these automations, you'll **shorten response times and improve productivity across your team**.

## Automatically categorize incoming emails

Many teams receive service requests via email, which often results in a **backlog of untriaged tickets**. Instead of manually sorting through requests, you can **automate email categorization** to get tickets to the right team faster.

### How automation helps:

- Assign a **specific component** based on keywords in the email.
- Auto-route emails to the correct **service desk queue**.
- Reduce **manual effort** while ensuring tickets land in the right place. You can create a basic email-to-Jira issue automation by configuring a [mail handler in Jira](#) (or a [service project email address in JSM](#)). For advanced email processing, like mapping email content to specific custom fields or assigning issues dynamically based on email content, try  [Power Scripts](#).

## Improve the handling of spam for service desk agents

Spam tickets can **clog up your service queue**, making it harder for agents to focus on real customer issues.

### How automation helps:

- Detect and **auto-close spam tickets** based on predefined criteria.
- **Filter out** auto-generated emails that don't require action.
- Reduce time wasted on **sorting through non-essential requests**.

First, [set up a Jira Service Desk email address](#), then apps like  **JMWE** make it easy to **set up rules for spam filtering and auto-resolution**.

## Turn incoming emails into Jira tickets

Do you receive **support requests via email**? Instead of **manually creating Jira tickets**, let automation handle it.

With [Power Scripts Mail Handler](#), you can:

- **Convert incoming emails** into Jira tickets automatically.
- Extract **relevant details** and populate ticket fields.
- Keep all customer requests **centralized in Jira** instead of scattered across inboxes.


This ensures every request is **logged, tracked, and assigned properly** without manual effort.

## Build workflows based on all sorts of criteria

Automation can **speed up workflows** by routing issues based on predefined rules. Here are some practical examples:

- **Assign tickets based on workload:** If Hannah has 20 open tickets while Miguel has 10, new tickets are assigned to Miguel automatically. [VIDEO: How to assign users based on workload with Power Scripts](#).

- **Auto-escalate overdue tickets:** If a ticket remains **open too long**, escalate it to the **next level of support**.
- **Link a service desk to a holiday calendar:** Automatically reroute **open service tickets** when key team members are out of office.
- **Streamline approval processes:** If a budget request is **under a set threshold**, approve it automatically. Larger requests can be sent to **finance for review**.

For example, with  [JSU](#), you can configure an automation rule to **escalate a ticket after 48 hours** if no action has been taken. [Learn how to do it](#).


## Minimize time spent searching for information in Jira

How much time does your team **waste searching for information**?

According to [Asana's 2022 Anatomy of Work Index](#), the average knowledge worker spends **58% of their day on “work about work”** – things like searching for information, switching between apps, and following up on status updates. That's a lot of **time spent on tasks that don't move projects forward**. In Jira, poorly structured search queries can make this even worse, turning a **simple request for information into a frustrating time sink**.

 How automation helps:

- Use [Jira Query Language \(JQL\)](#) for **faster, more precise searches**.
- Set up **saved filters** for frequently searched queries.
- **Generate custom reports** to surface relevant data automatically.

If you're new to JQL, apps like  [JQL Search Extensions for Jira](#) offer over **50+ advanced search functions** to help you get more granular results. For example:

- **Find linked issues with specific criteria.** Not just any linked issue, but those tied to a certain status or priority.
- **Search historical field values.** Track issues that were previously assigned to a specific user or had a past custom field value.
- **Use wildcard and regex searches.** Go beyond standard JQL text searches by matching complex patterns in summaries, descriptions, or custom fields.

- **Perform bi-directional searches in issue hierarchies.** Easily navigate upward to parent issues or downward to subtasks.
- **Search attachments by type or filename.** Quickly find issues with specific file types, like PDFs, by filtering attachment names ending in “.pdf”.

### Why these automations matter

By reducing bottlenecks, you help your team:

- **Get work done faster** with fewer delays.
- **Eliminate unnecessary manual steps** in workflows.
- **Spend more time solving problems** instead of tracking down information.

With the right automations in place, your team can **work smarter, not harder** – freeing up time for more important tasks.

## 4. Do things in bulk

Some repetitive tasks are unavoidable – but that doesn't mean they have to be painful.

If your team spends **too much time making manual updates**, it's time to automate. Bulk operations in Jira let you **apply changes across multiple issues at once**, saving you **time, effort, and frustration**.

Instead of handling tasks **one by one**, automation lets you **update hundreds or even thousands of issues in just a few clicks**.

### Standardize processes by bulk-cloning and customizing issues


Many teams work on **similar projects with slight variations**, making **manual issue creation redundant**.

For example:

- A **mobile development team** releases the same features for both **iOS and Android**.
- A **security team** performs **recurring audits** across multiple departments.
- A **marketing team** creates similar tasks for every **campaign launch**.

Instead of **recreating issues from scratch**, automation lets you:

- **Bulk-clone up to 1,000 issues** at once.
- **Customize cloned issues** to fit specific project needs.
- **Eliminate redundancy** while keeping processes consistent.

Jira lets you clone individual issues, but if you need to copy and modify multiple issues at once, its native features can be limiting.  [Clone Plus for Jira](#) goes further by helping you **bulk clone issues with customized field values**.


## Import bulk data from external sources

Jira admins often need to **sync data from external systems**, whether it's **customer records**, **support tickets**, or **project updates**.

While Jira supports **CSV imports**, complex data migration requires more flexibility.

### How automation helps:

- **Import structured data** from external databases, CRM tools, or spreadsheets.
- **Map fields automatically** to ensure accuracy.
- **Avoid time-consuming manual data entry.**

For advanced use cases,  [Jira CLI](#) enables bulk imports with **custom rules and conditions** from a terminal interface.


## Add new users from a spreadsheet in bulk

Scaling teams often need to **onboard large numbers of new users in Jira**. Doing this **one user at a time** is inefficient, especially after:

- A **company merger** that requires **adding hundreds of new employees**.
- A **team expansion** where multiple new hires need **instant Jira access**.
- A **shift to Jira** from another system, requiring **bulk user creation**.



### How automation helps:

- **Bulk-upload users from a CSV file** in minutes.
- **Automatically assign permissions and roles** based on department or project.
- **Eliminate manual account creation delays.**

With  [Jira CLI](#), you can **import hundreds of users at once** while applying **predefined permission settings**, reducing onboarding time **significantly**.

### Take bulk automation up a notch

Once you've mastered bulk operations, consider **scaling automation further** with:

-  [Power Scripts](#) – for applying conditional logic across large Jira instances with simple scripts.
-  [Jira CLI](#) – for advanced bulk updates, imports, and user management from a command line terminal.

The more you automate, the **more time your team gets back** to focus on high-value work.

### Why these automations matter

By handling bulk actions **efficiently**, your team will

- **Save hours of manual effort** every week.
- **Eliminate repetitive tasks** that slow projects down.
- **Guarantee accuracy across multiple issues, users, and projects.**

Instead of spending time on **administrative work**, your team can **focus on delivering meaningful results**.

# That's a wrap

Now you're equipped with the **strategies, apps, and automation tips** to streamline Jira workflows, reduce manual effort, and **keep your teams in sync**.

With the right **automation rules and bulk operations**, you can:

- **Eliminate repetitive tasks** that slow your team down.
- **Improve accuracy** by keeping data in sync across Jira.
- **Reduce bottlenecks** and keep work moving efficiently.
- **Save time** so your team can focus on what matters most.

## What's next?

1. **Start implementing automation today** – even small changes can make a big difference.
2. **Download the Jira admin's checklist for automating Jira** at the end of this guide for a step-by-step plan.
3. **Explore Appfire's user-loved automation apps** to make your work flow.

With these automation strategies in place, **your team can work faster, smarter, and with fewer headaches**.

Ready to enjoy better workflows? Let's go!

# The Jira admin's checklist for automating Jira

Automation helps you streamline your business, improve efficiency, and reduce manual tasks, but to get the most value, you need a solid plan.

Follow these steps to set up automation the right way:

## 1. Identify automation opportunities

**Look for patterns** in existing requests to pinpoint repetitive tasks that you can automate.

**Engage with everyday users** to understand which tasks take the most time and how automation could improve productivity.

## 2. Plan your automation strategy

**Define your rules** so they align with business and process goals.

**Scope your rules:** Decide if they apply to a single project, multiple projects, or your entire organization.

**Assess feature requirements** - if Jira's built-in automation doesn't support your needs, explore **third-party apps** in the Atlassian Marketplace.

## 3. Build and test automation rules

**Design automation rules** that are clear, easy to understand, and reusable.

**Test your rule on a single Jira issue** before expanding it to avoid unintended disruptions.

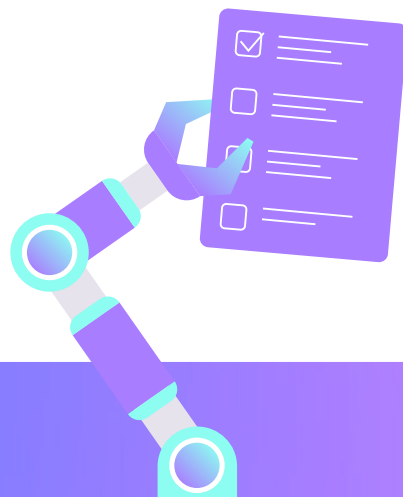
**Use the "Log action" feature** to capture outputs and verify that your automation works correctly.

## 4. Document and maintain your automation setup

**Keep a record of your automation rules**, including what they're for and how they align with your organization's goals.

**Track the automation tools and apps you use**, along with links to documentation and help desks.

**Store automation rules in a version control system.** This ensures you have backups and can roll back changes if needed.



# Appfire apps that help Jira admins get stuff done

Time is one of your team's most valuable resources. The best way to show you **value their time**? Free them from repetitive, manual tasks.

With the right automation apps, you can eliminate **frustrating busywork** so your team can focus on **high-impact projects**.

Here are some powerful Appfire apps that can help you get there:



## JSU Automation Suite for Jira Workflows

**Kick-start your workflow automation**

Beginner-friendly, no-code automation for Jira admins. Automate issue transitions, approvals, and field updates with just a few clicks. Perfect for teams looking for quick wins without scripting.

[Try JSU for free](#)



## Jira Misc Workflow Extensions (JMWE)

**Advance your workflow automation**

Automate complex workflows with point-and-click tools + simple scripting. Set up custom post functions, triggers, and conditions without deep coding knowledge. A great balance between flexibility and ease of use.

[Try JMWE for free](#)



## Power Scripts for Jira

**Take control of your Jira instance**

Advanced scripting capabilities for Jira admins who need deep customization. Automate repetitive tasks, complex workflows, and integrations across external systems. Perfect for teams managing large-scale Jira implementations.

[Try Power Scripts for free](#)



## Jira Command Line Interface (CLI)

Automate, integrate, and migrate Jira with ease

Run bulk actions with simple commands. Automate imports, updates, and user management.

[Try Jira CLI for free](#)



## Clone Plus for Jira

Power up your Jira issue cloning

Clone multiple issues at once with custom field values. Save time by reusing templates for recurring tasks and projects.

[Try Clone Plus for free](#)



## Jira Misc Custom Fields (JMCF)

Tap into Jira's hidden potential

Create calculated fields for smarter workflows, real-time reporting, and better issue tracking—no coding needed.

[Try JMCF for free](#)



## JQL Search Extensions for Jira

Expand your searching capabilities in Jira

Boost JQL with advanced search functions for precise reports, filters, and dashboards. Get insights instantly.

[Try JQL Search Extensions for free](#)



#### About Appfire:

Appfire is a global authority in the Atlassian ecosystem. Appfire's popular solutions help teams with Workflow Automation, Product Portfolio Management, IT Service Management, Document Management, Business Intelligence and Reporting, Administrative Tools, Agile, Developer Tools, and Publishing. The company has the most widely adopted portfolio of apps on the Atlassian Marketplace, with 225,000 active installations worldwide. Learn more at [www.appfire.com](http://www.appfire.com).

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