To begin, the user selects the **Top-level planing** template.

Top-level planning

🔷 Jira **PREMIUM**

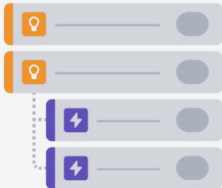Monitor work from multiple projects, and create an easy-to-share plan for stakeholders.

Which takes them to an overview of the template:

Top-level planning

Define your organization's goals then track your delivery towards them across your teams using plans.
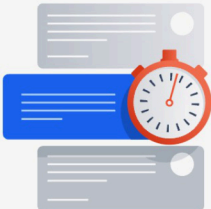
Set goals for your organization

With an extra hierarchy level above Epic called Initiative, you can define organizational-level goals, and plan work towards them.

View all of your work at once

View multiple projects, boards, or filters in a single timeline. Add dependencies and manage the capacity of your teams to create a single source of truth for your organization.

Always up-to-date

The values in your plan can automatically update to show how changes impact your deliverables in real time.

PRODUCT

🔷 Jira

RECOMMENDED FOR

Project leads that need to plan at scale, track cross-team dependencies, and manage capacity

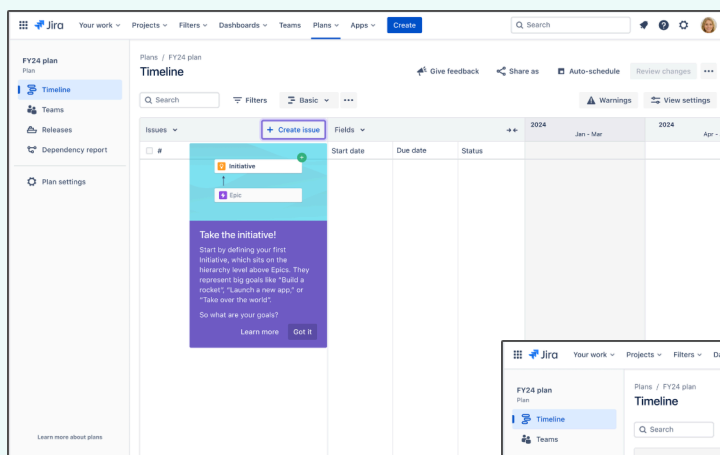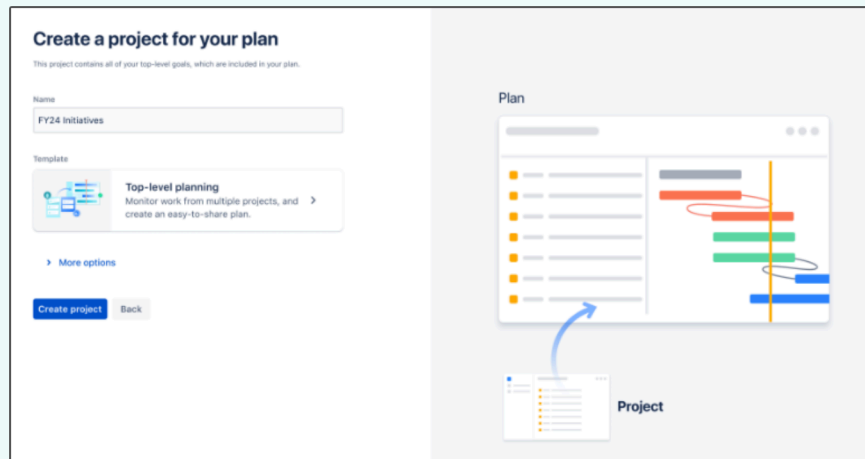**ISSUE TYPES**

🔶 Initiative

WORKFLOW

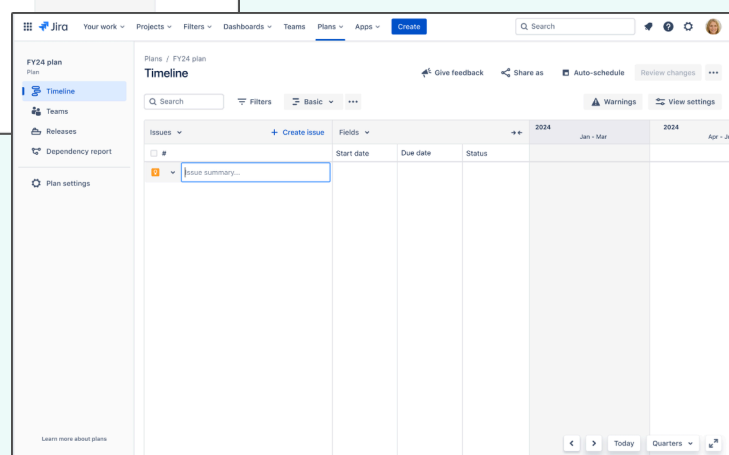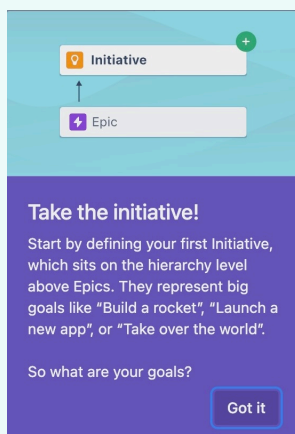TO DO

IN PROGRESS
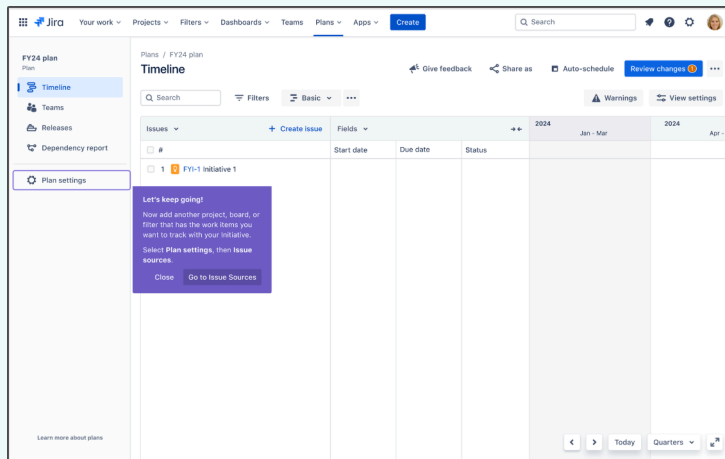
DONE

Use template

This template creates:

- a hierarchy level above Epic called **Initiative** in the user's site (assuming they have permission)
- a project that's sole use is to house Initiatives
- a plan to align their work

The same name is used for the plan and the project.

In their newly-created plan, they create an issue at the **Initiative** level.
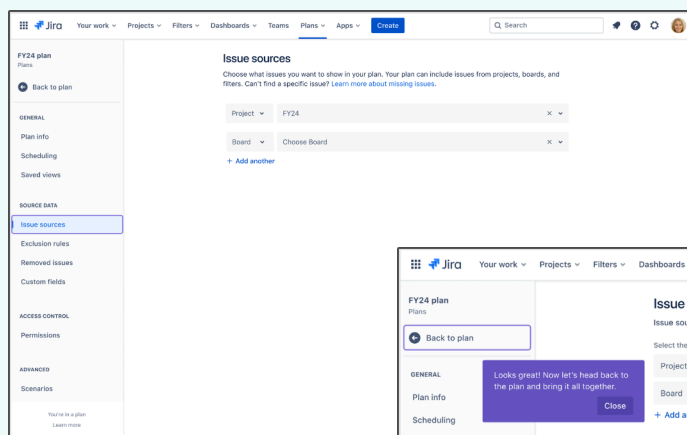
Now they need to add an existing project to their plan. Once they do, they'll be able to connect their work to their newly-created high-level issues. However, the screen on which they do that isn't easily accessible from here.
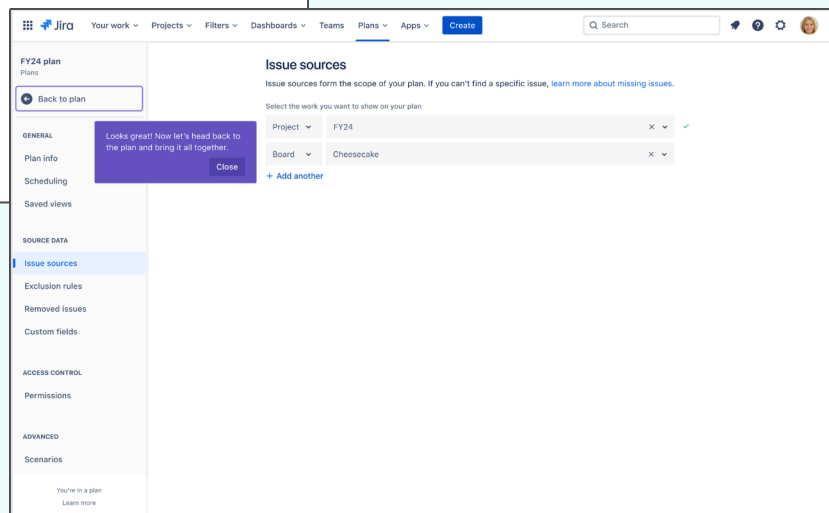
This could easily be solved by adding a link to the next screen (which is what I did). But I also included the navigation path so users can find the menu later.

On the Issue sources page, the user follows the prompts on the screen, and adds a project. There's no direction on this step, but the Issue sources side nav item has a visual treatment to remind them where to find this screen again.

A prompt appears once they've added one project, but they can add as many projects as they want.

For this use, I chose to let them navigate away once they were done (instead of having a CTA here).

Back on the timeline, the set up is almost complete. The user needs to associate an Epic from the projects that they just added to their Initiative. They do this by dragging and dropping the Epic they want to reparent.

To complete your planning spree, drag and drop an Epic under an Initiative. This lets you roll-up values from all the child issues to the Initiative level.
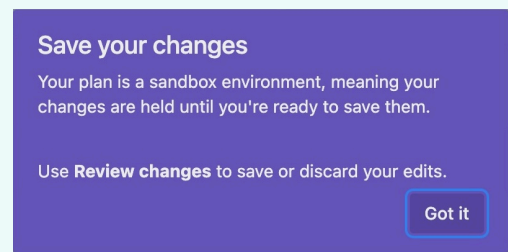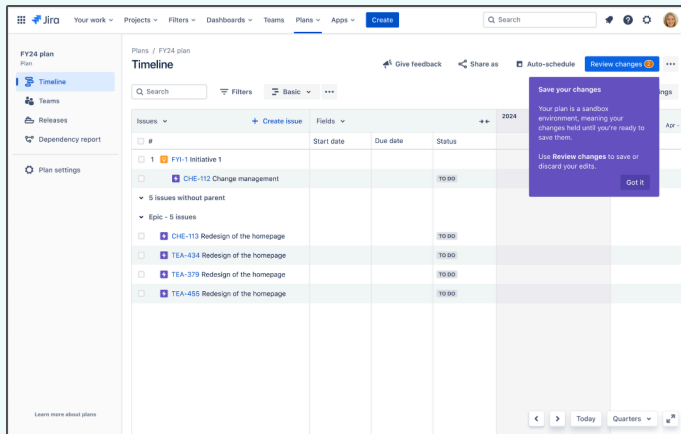
Got it

If the project(s) they added don't have Epic-type issues, we show this message. It's shown here (and not on the previous page) because we can't run the BE check to see if their project has the right issue types until they come back to this page.

To keep going, add a project to your plan that includes at least one Epic.

Skip   Go to issue sources

The last thing the user needs to do is to save their changes. This applies what they've done here to the data in the rest of their site.

Save your changes

Your plan is a sandbox environment, meaning your changes are held until you're ready to save them.

Use **Review changes** to save or discard your edits.

Got it

And they're done! With their plan complete, we let them loose on the world. As a parting message, we show a small flag in the corner reminding them about other help resources available to them.

🎉 **You've made your first plan!** 🎉   ✕

But why stop here? Learn how to take your planning to the next level!

Take the full tour · Read the documentation