

Fielder's choice: how we label fields in Jira (and beyond)



On this page, I will:

- outline changes to how we talk about Fields in Jira
- go through how this simplifies the user experience for both end-users and admins by unifying field types and improving clarity
- give examples using the Project screens as well as the admin experience
- provide a glimpse into what the future holds, and how you can contribute

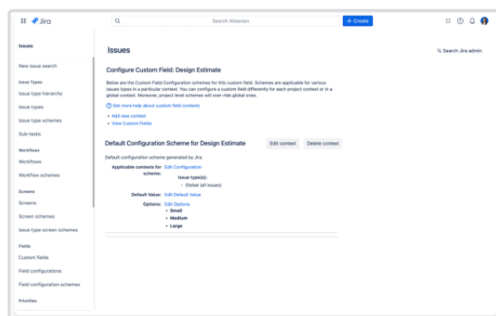
- Working definitions
- Background of this change
- The changes
- What this looks like in a project
- What this looks like in the Admin space and in docs
- Summation and closing thoughts

Working definitions

Before we begin, I want to make sure we're on the same page with our terminology:

- When I say **admin**, I'm referring to those who *manage* Jira as a tool - i.e. Jira admins and Site admins
- When I say **end user**, I'm referring to those who *use* Jira to drive work objectives - i.e. project admins, project owners, users who update tickets in a project.

Background of this change



Since (at least) last year, a few teams in Jira have been reimagining how Fields work in Jira with the aim of centralizing fields management. The key driver of this work is to improve the management experience of large sites.

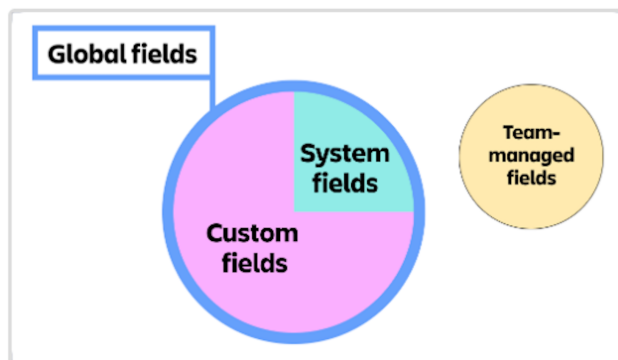
To do this, we're improving overall site performance, centralizing field management, creating tools for admin tasks like consolidating duplicate fields, and simplifying the Jira Admin experience — starting with Fields.

As part of this work, we're improving the outdated and hard-to-use interface that may be as old as Jira itself. In this experience, we have four main field types: Global fields, System fields, Custom fields, and fields made in team-managed projects.

Using this many labels creates problems on all fronts:

- they're loaded with inferred meanings that are hard for new users to understand
- they differences aren't exclusive or intuitive, which makes redesigning the Fields experience cumbersome
- there's significant overlap in naming despite relatively small differences

Side note: what are these four field types?



- **Global fields** refer to any field made or managed by a Jira Admin. These fields can be used in multiple projects with the same configuration and updated in one central place.

- **System fields** refer to Global fields created by an app, a plugin, or a service and therefore can't be edited. The entity that created them requires them to be configured in a certain way.

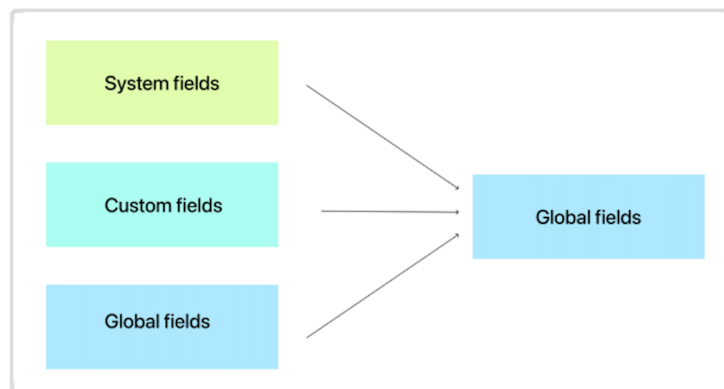
- **Custom fields** are Global fields created by an admin that can be edited as their function is not essential to any automated processes or functions in Jira.
- **Team-managed fields** are fields created in a team-managed project. As with everything else created in team-managed projects, these fields can be created by users who are not Jira Admins, and cannot be shared with other projects.

The changes

tl;dr - The Fields redesign work that my team is doing represents the lion's share of the work to move this concept. In most other experiences across Jira that you might be working on, this is only a terminology update.

- The terms **System fields** and **Custom fields** have been retired, and their limitations communicated through design.
- The terms **Global fields** and **team-managed fields** have been unified into **Fields**, and any differences captured by the previous labels should be defined contextually.

Change #1 - we retire the labels “System fields” and “Custom fields”



System fields and Custom fields are both types of Global field. The main differences are:

- who made them (Jira or an admin)
- whether they can be edited or not

Not only does labeling them this way obfuscate their meaning, it also overstates the differences. Instead, we can present this information contextually through design for a more intuitive experience.

We're solving the first difference by adding a column to the Fields page that shows who created the field. Those made by Jira or a plugin will list the name of that service while those made by an admin will show the name of the creator.

The second difference can be handled in UI: if a field can't be edited, we can remove the ability to edit the field and provide an explanation such as *This field was created by an app or service and cannot be edited.*

Change #2 - Fields becomes the default terminology, and define what makes them different contextually

Since large orgs almost exclusively use shared Global fields to manage their Jira sites at scale and because the term ‘team-managed fields’ is poorly understood, most users assume that all fields are global fields. We can leverage this assumption, and frame Global fields as the default field in Jira.

To do this, we should replace Global fields and fields in team-managed projects with the term **Fields**. Then, when referring to fields in team-managed projects, we define the limitations of those fields contextually in a way that makes sense to the user at that time.

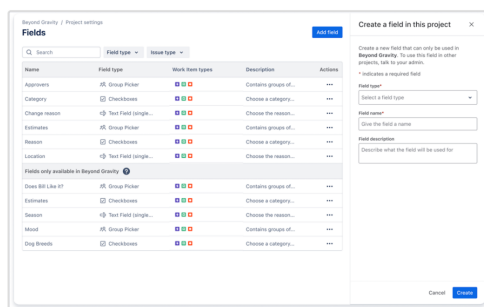
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What this looks like in a project



tl;dr - In projects, the Global fields and team-managed fields pages have been combined into one page called **Fields**. On this page, we refer to team-managed fields as **Fields only available in [project name]** to highlight their limited usage and scope.

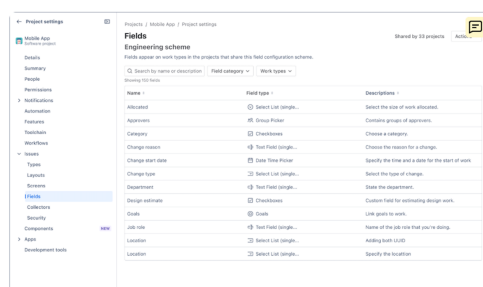
In team-managed projects:



- the common fields made by an administrator (formerly Global fields) are labeled as **Fields**
- fields made in this team-managed project — which cannot be shared outside of it — are labeled as **Fields only available in [project name]**
- when users create a field, the panel calls out that they’re creating a field that can only be used in this project

In other contexts where we refer to each type of field, we’ll apply the same framing.

In company-managed projects, we only refer to **Fields** because:



- these are the default fields in Jira
- this labeling aligns with how most customers think of fields
- there’s no other type of fields in these projects

What this looks like in Admin screens and docs



tl;dr - There's no one-size-fits-all answer when noting the differences between field types in Admin screens and documentation. As the Content Designer on your work, you'll need to make decisions about the best framing, such as:

- What are the key differences you're trying to communicate in this moment?
- What framing best communicates the impact of this choice to the audience?
- Does this framing align with the overall goal of the task at hand?

After all of this, you might still decide the label "Fields made in team-managed projects" is the best descriptor for your usage — *and that's okay!* This is an ongoing conversation that will continue long after this stream of work ends.

While I can't be as prescriptive as I was in the previous section, I can show you an example of how we're approaching this in the Fields screens in the Admin section of Jira.

As I mentioned before, one aim of this work is to deliver centralized fields management features such as deleting unused fields, easier management of fields at scale, and the condensing of duplicates including fields made in team-managed projects. The screen below is the new Fields page which includes a filter that allows Admins to only show fields made in team-managed projects, only fields made by site admins, and all fields.

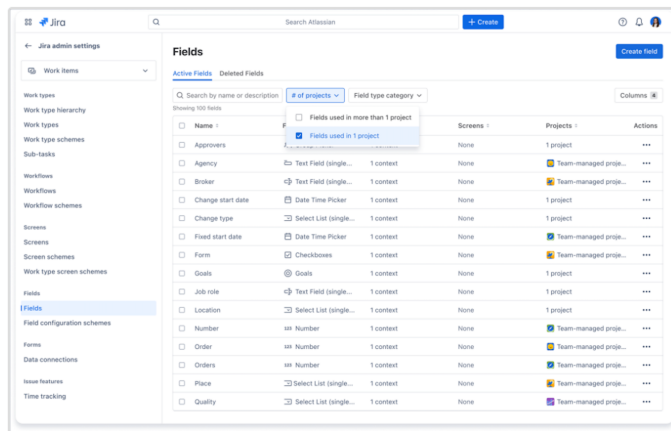
Since our main audience of this page is Admins, we know that:

- they rarely use team-managed projects at all, so their main interaction will be managing them at scale
- when dealing with these fields, the main action will most likely be cleaning up duplicates, though this can apply to all fields
- fields from team-managed projects can't be used in multiple, other projects

When using this screen, we think Admins will want to know:

- Was this field made in a company or team-managed project?
- How many projects use this field?
- Who made this field?
- When was this field created?

Based on how we understand this group and their motivations, we're using the **# of projects** as the main differentiating characteristic.



“But Eddie,” I hear you say. “A field made by an admin can also be used in only one project.”

And that’s correct, but since we believe this filter will mostly be used when consolidating fields, orphaned fields of all types may be painted with the same brush. In this case, being from a team-managed project isn’t the key metric by which they’d sort this list.

The same logic applies to the documentation. We can write a story about how to use this page based on what we think the main use cases are, such as:

- Use the **# of projects** filter to find fields that can be consolidated into one.

Summation and closing thoughts

If you’re working on projects in Jira, the direction is pretty straightforward. And that’s not really the focus of this page.

I wrote this page to spark conversation for those working in admin spaces. One of the upshots of this change is that you’ll have more room to explore naming conventions that work best for your specific experience. From here, teams working on similar features may decide that one specific factor is the best when admins are doing [insert activity here], and want to drive that consistency across their work. In which case, I love this for you, you’re doing great work, and please share back with the group how you came to that decision.