

# Getting Started

This is a step-by-step instruction on how to configure Insight for your Jira instance.

**i** Before you start configuring Insight, we recommend you to [learn the concepts](#) of Insight first. You need to be a member of the global permission **Jira Administrators** to follow these instructions from start to finish.

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This is the recommended "reading path" to learn all about Insight - in no time.

**i** First of all, let us conclude that Insight is a rather big product - the solutions possible to implement with Insight are almost endless.

To learn Insight as quick as possible, we recommend this path:

1. Learn the [Insight Concepts](#)
2. Take the [101 tutorial](#)
3. Attend an Insight webinar (check our [website](#) for available dates)
4. Install and Configure Insight (as described in this page)
5. Learn more about [Insight Post Functions](#) and the [Automation Framework](#)
6. Learn more about the [API](#)

Following this path will quickly get you skilled in the possibilities you have with Insight.

## Step 1 - Install Insight

Follow [this procedure](#) to download and install Insight to your Jira instance.

## Step 2 - Create Object Schema

Follow [this procedure](#) to create your first Object Schema. There are a few settings for your Schema that you might want to configure at this stage but you can also do it later. Some things to consider:

- References - name and color (the reference color is seen in all the graphs)
- Icons - you can add your own icons if you want
- Statuses - If you want to create statuses that should be used by status attributes

## Step 3 - Setup Permissions

Read [this page](#) to understand and configure global permissions as well as permissions for your newly created Object Schema.

## Step 4 - Create Object Types

Object Types are the foundation of your Schema, it's where you decide what types of Objects should be created and managed in Insight. You can create Object Types manually by pressing the plus sign **+** available in the left hand Object Type navigation panel. You can also import Objects and Object Types from any of the options described [here](#). Remember that you can use drag-and-drop to easily rearrange your Object Type structure.

## Step 5 - Create Attributes

You setup Attributes for each Object Type. Attributes are described in detail on [this page](#).

## Step 6 - Create Objects

You can create objects manually by pressing the **Create Object** button available from every view in Insight. You can also import Objects from any of the options described [here](#). It's perfectly fine to add, change and remove Object Type Attributes even when you have created Objects, but as rule of thumb - it's more efficient to configure most of the attributes before creating a lot of Objects to avoid the need to modify all the Objects with the newly added Attribute. But no worries, Insight comes with "Bulk Edit".

This is the last stage of your Insight setup. You now have a system to manage all the things that are of importance for you.

# Step 7 - Enable Insight on Jira Screens

## Step 7.1 - Create Insight Custom Field(s)

Insight provides a set of special custom fields to be placed on your Jira Screens.

Custom Field Name	Description
Insight Object (single select)	This Custom Field will be connected to a node in Insight to show a selectable list (drop down) of Objects. You can configure the field to also include child Object Types and their Objects. This field allows the user to only select one Object (single select). Read more <a href="#">here</a> .
Insight Object (multi select)	This Custom Field will be connected to a node in Insight to show a selectable list (drop down) of Objects. You can configure the field to also include child Object Types and their Objects. This field allows the user to select multiple Objects (multi select). Read more <a href="#">here</a> .
Insight Object (read only)	Read Only field, read more <a href="#">here</a> .
Insight Referenced Object (single select)	This Custom Field will be dependent on another Insight Object field to offer cascading features (single select). Read more <a href="#">here</a> .
Insight Referenced Object (multi select)	This Custom Field will be dependent on another Insight Object field to offer cascading features (multi select). Read more <a href="#">here</a> .

## Step 7.2 - Configure your Insight Custom Field(s)

You have now created your first Insight custom field and placed in on your desired screen(s). It's time to configure the field to make it work properly.

### Configure Insight Custom Field

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**Scope**

Object Schema **ITSM Schema** ⓘ

Filter Scope (IQL) **Objecttype=Host ORDER BY label ASC** ⓘ

Filter Issue Scope (IQL) **Not configured** ⓘ

Filter Assign Scope (IQL) **Not configured** ⓘ

Make Filter Assign Strict  ⓘ

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**User Interaction**

Type of interaction  **Select** ⓘ  
 **Checkbox / Radio button**

Object attributes on Issue view  ⓘ

Multiple  ⓘ

Option to add all objects  ⓘ

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**Service Desk**

Show object picker on customer portals  ⓘ

[Return to Jira Custom Field](#)

## Step 7.3 - Integrate with Jira Service Desk (optional)

By step 7.2, you have successfully integrated Insight with Jira and your users can start reporting issues on your objects. A lot of organisations are also running Jira Service Desk and the following instructions are aimed for these users. We have already described this straightforward process on this [page](#) and by following this procedure you'll be up and running in minutes with Insight custom fields on your JSD customer portal.