



# Create a custom onboarding experience



By default, Jira admins have access to custom onboarding. To give other users this ability, a Jira admin needs to grant them the *Manage custom onboarding* permission.

[How to grant the custom onboarding permission](#)

Custom onboarding lets you create tailored onboarding experiences for different teams within your organization. This means you can embed your company's best practices, internal Jira documentation, and branded welcome messages directly into onboarding flows. [Read more about custom onboarding](#)



Custom onboarding is available on Premium and Enterprise plans.

## Set up custom onboarding

When new users join Jira, the first thing they're asked to do is select what kind of work they do. For example, do they work in software development, project management, marketing, or another role? We use this information to suggest templates and features in Jira that will be most relevant to their role.

Custom onboarding allows admins to create tailored welcome experiences for these roles, featuring your own

Set up custom onboarding for your users

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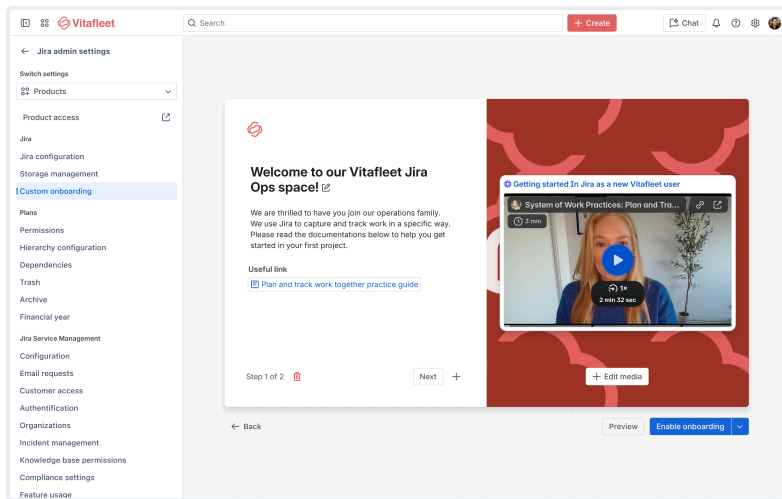
company content and resources, to make the onboarding experience more relevant for your people.

You can create custom onboarding for 14 different roles in your organization. Each role can only be assigned to one onboarding experience, but you can include multiple roles within a single onboarding. For example, you could have one onboarding experience that covers all 14 roles, or you could have a few different onboarding experiences that cover the most relevant roles within your company.

Analyze custom onboarding

Community

Questions, discussions, and articles



## Access the custom onboarding hub

- If you're a Jira admin, access the custom onboarding hub by selecting **Settings** (⚙️), then **Jira apps**, then **Custom onboarding**.
- If you've been granted access to custom onboarding by a Jira admin, select **Settings** (⚙️), then **Manage custom onboarding**.

## Create a custom onboarding experience

To create a new custom onboarding experience:

1. Go to the custom onboarding hub by selecting **Settings** (⚙️), then **Jira apps**, then **Custom onboarding**.
2. Select **Create new onboarding**.
3. Enter a name for the onboarding experience.
4. Select what roles you want to target, then select **Next**.
5. Add your onboarding content:
  - a. Select the title to enter your own title.
  - b. Select the text below the title to enter your own welcome message.

- c. Under **Useful link**, select **Edit** (  ) to add a link to your internal Jira documentation. This will be displayed as a Smart Link to enable dynamic content and permission controls. [What products support Smart Links?](#)
  - d. Select **Edit cover** to embed a video or upload a background image (you can do either, or both). You can embed a video from Loom, YouTube, Google Drive, Vimeo, Dropbox, or Box.
6. Select **Add step** to add another step (up to a maximum of 3 steps).
  7. Select **Preview** to see what the onboarding experience will look like to new users.
  8. Select **Enable onboarding** to finish. Your custom onboarding experience will now be shown to new users who belong to the role you chose in step 5.
    - a. To save your onboarding in a draft state, select **Save without enabling**. You can enable it later by editing it again or enabling it directly from the onboarding hub.



The logo shown in custom onboarding experiences comes from your system settings. [Configure the look and feel of Jira applications](#)

## Edit or delete a custom onboarding experience

To update an existing custom onboarding experience:

1. Go to the custom onboarding hub by selecting **Settings** (  ), then **Jira apps**, then **Custom onboarding**.
2. In the table, find the onboarding experience you want to edit and select **Actions** (⋮)
  - a. To update the onboarding experience, select **Edit**.
  - b. To delete the onboarding, select **Delete**.

## Enable or disable a custom onboarding experience

To enable or disable a custom onboarding experience:

1. Go to the custom onboarding hub by selecting **Settings** (  ), then **Jira apps**, then **Custom onboarding**.
2. In the table, find the onboarding experience you want to edit and select **Actions** (⋮)

- a. To hide the onboarding, select **Disable**. When an onboarding experience is disabled, it won't be shown to anyone.
- b. To show the onboarding to new users, select **Enable**.
- c. To permanently delete the onboarding, select **Delete**. Deleted onboarding experiences can't be recovered later.

## Analyze custom onboarding

The custom onboarding hub shows a range of engagement metrics to help you evaluate the performance of your onboarding experiences. [Find out how to understand and action custom onboarding data insights](#)

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Yes

No

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### Still need help?

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