# **Jira Administration: Automation**

with Rachel Wright



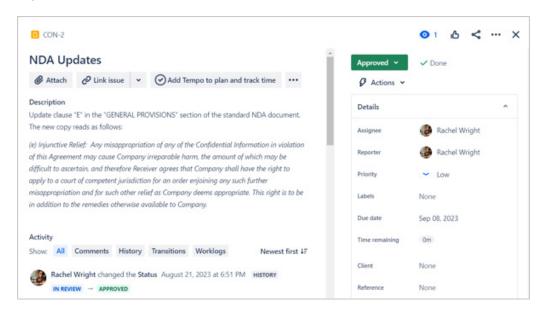
# Jira Jargon

Important terms and definitions

### General

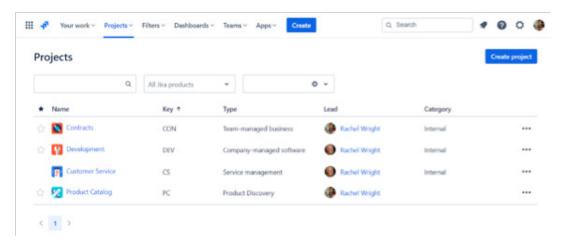
#### Issue—an individual item in Jira

Each time you create an item, you create a new issue with a unique key to identify it. An issue is any individual record in the Jira database.



## Project—a collection of Jira issues

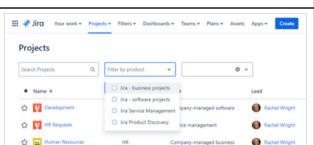
The word "project" in Jira is different than an initiative your team is working on outside of Jira. Think of a Jira project as a container for all your team's initiatives, tasks, and "to do" items. There is generally one Jira project per department, system, team, or application. Example: A Jira project called "Development" to track new features, bug fixes, and maintenance work.



#### **PROJECT TYPES**

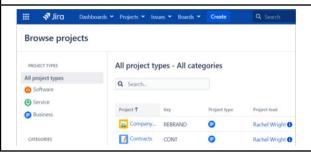
#### Cloud

The Cloud project types are Business, Software, Jira Service Management, and Jira Product Discovery.



#### **Server and Data Center**

The Server and Data Center project types are Software, Service, and Business.



Cloud also has company-managed and team-managed project types.

- Company-managed projects use schemes that are managed by Jira administrators.
- Team-managed projects are scheme-less and are managed by regular users.

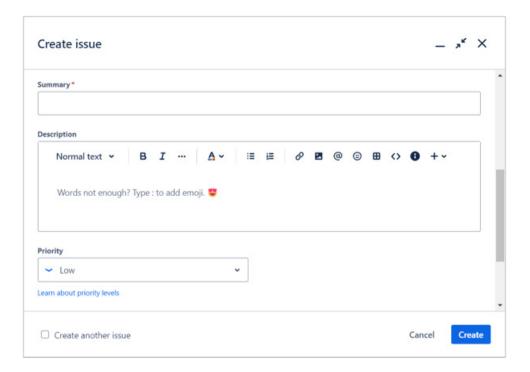
# Workflow—a sequence of life cycle steps to reach a goal

A workflow is a visual representation of a process. It contains a sequence of standard steps that each issue must go through to be completed. Each step of the process is represented by a status that describes an issue's current state.



**Field**—a place to collect and store information

The example shows an issue creation screen that contains multiple fields. The first field, named "Summary," is always required.

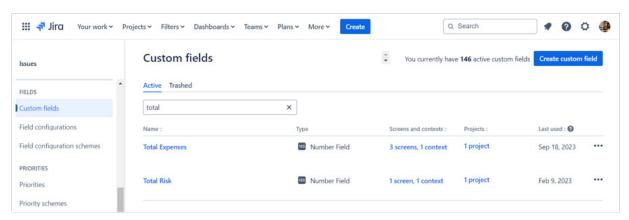


#### Standard field—built into Jira

Examples: Summary, Description, Priority, Comments, and more

# **Custom field**—created by administrators, users, or apps

The example shows two custom number fields called "Total Expenses" and "Total Risk." Access the custom fields page in the issues admin area.



Automation—making equipment, a process, or a system operate automatically

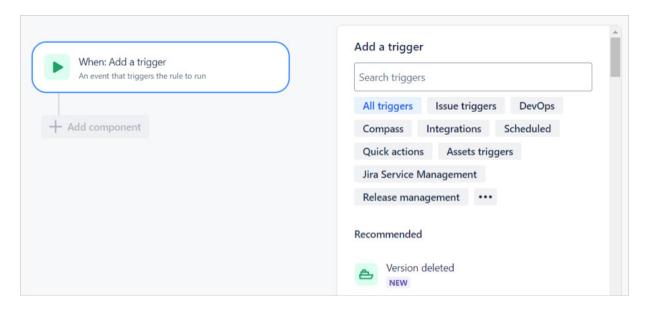
For example, set the coffee maker to automatically start brewing a new pot of coffee at 9:00 a.m. on weekdays.

## Rule—repeatable, criteria-based actions

Automations are configured using rules. Rules store the criteria for when and how actions are performed. Example rule: Each time an issue is created, check to see if it's part of an epic. If an epic exists, then edit the assignee field.

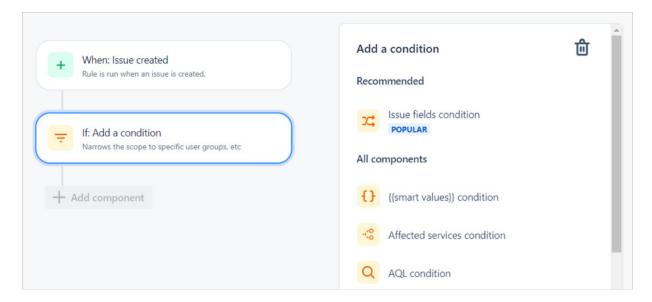
# **Trigger**—activates a rule

The first instruction in every rule is a trigger. Triggers specify when a rule is run, like after an issue is created, after an issue is assigned, when a version is deleted, and more.



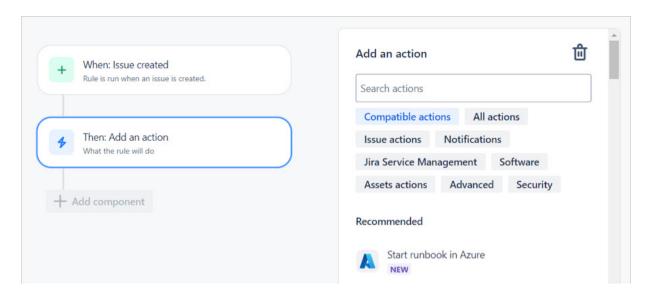
# **Condition**—defines rule scope

Conditions determine the scope of a rule and how much data is impacted. For example, impact issues that are the result of a JQL statement, with an "if or else" clause, or by a specific value in an issue field.



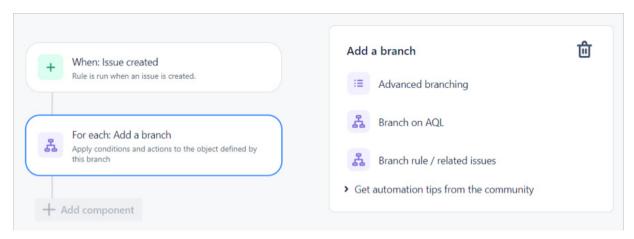
## Action—defines activities performed

Actions determine what is done, like editing an issue, sending an email message, transitioning an issue, releasing a version, and more.



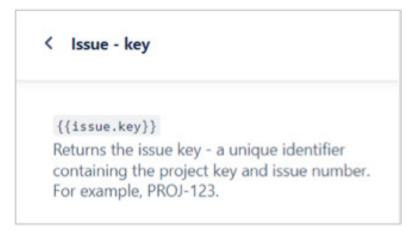
**Branch**—applies conditions and actions to related issues or objects

For example, close all sub-tasks of the issue that triggered the rule, or perform an action on multiple comments in an issue.



Smart value—a placeholder to access, substitute, and manipulate issue data

Instead of hard coding a Jira issue key in an automation rule, you can use the format {{issue.key}} to insert it as a placeholder.



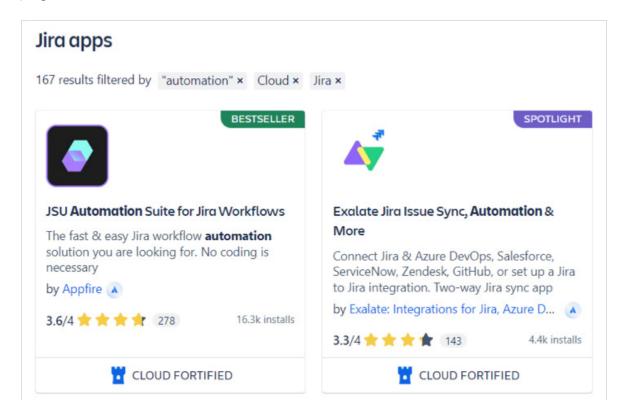
### JSON—JavaScript Object Notation

JSON is a lightweight, universal way to store and transmit data in web applications. You can use it in automation rules, and it's the format for exported Jira automation rules.

```
{
    "animals": [{
        "name": "Alligator",
        "type": "Reptile"
        },
        {
        "name": "Shark",
        "type": "Fish"
        }
    ]
}
```

### Apps—third-party software that extends Jira capabilities

Apps are extensions or modules that provide additional Jira functionality. There are hundreds of free and paid apps in the <u>Atlassian Marketplace</u> to enhance and add planning features, time tracking, reporting, test management, and more. These were formerly known as add-ons or plug-ins.



# Jira Cloud Plans

Jira Cloud products have plans with different features, prices, and monthly automation rule execution limits. See the limits on Atlassian's pricing pages:

- Jira: <a href="https://www.atlassian.com/software/jira/pricing">https://www.atlassian.com/software/jira/pricing</a>
- Jira Service Management: https://www.atlassian.com/software/jira/service-management/pricing
- Jira Product Discovery: <a href="https://www.atlassian.com/software/jira/product-discovery/pricing">https://www.atlassian.com/software/jira/product-discovery/pricing</a>

Application	Plans
Jira	Free, Standard, Premium, and Enterprise
Jira Service Management	Free, Standard, Premium, and Enterprise
Jira Product Discovery	Free, Standard, and Premium