

AUTOMATE TASKS AND PROCESSES WITH JIRA

After obtaining google project management certification, I had an immense zeal to gain hands-on experience using Jira. Here, I have created automation rules using triggers, conditions and actions to auto assign tasks, and by applying sub tasks templates to reflect a business processed into project management. Additionally, I have added branches by applying conditions based on relationships between issues so to automatically update their status depending on completion of their sub-tasks. Finally, I used smart values to interact with Jira information and optimize communication by sending automatic emails depending on events of project management given for ecommerce application.

TASK 1:

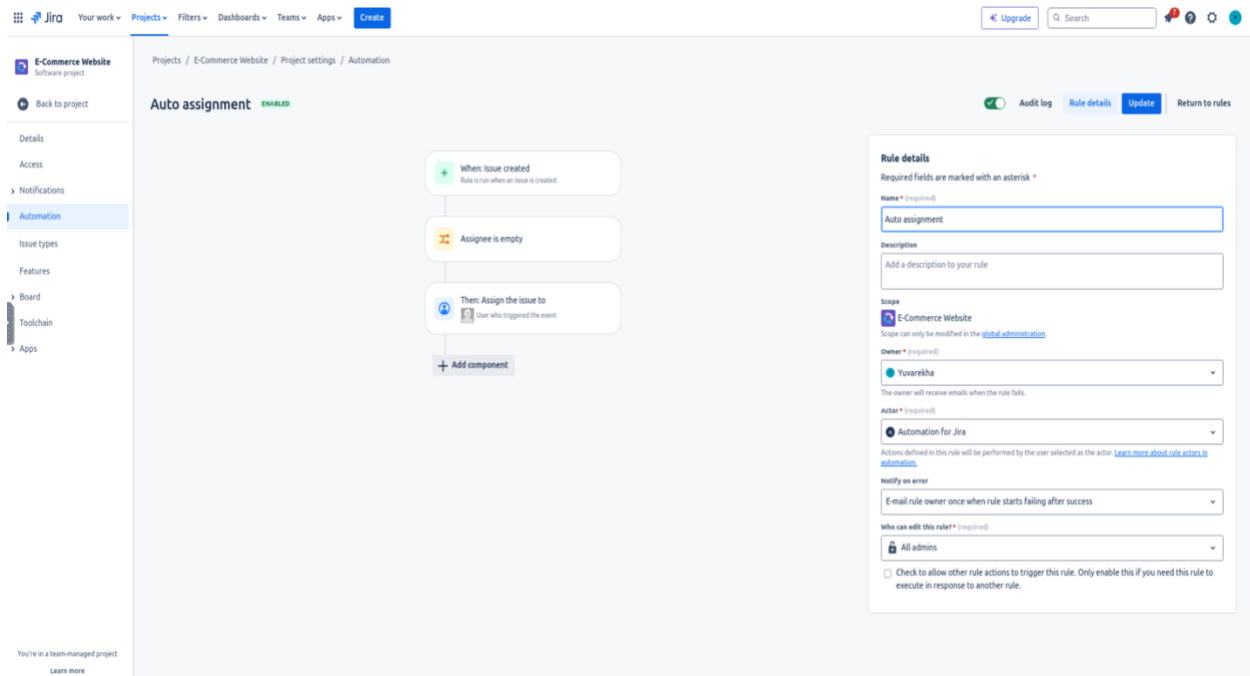
Practice Activity	Key skill	Business goal	Hint
Create a new “E-Commerce website” project and automatically assign all new issues to the reporter	Create an automation rule with trigger, condition and action	Ensure every issue has someone accountable for it	The reporter is the person creating the issue. Create an automation rule triggered by issue creation if assignee is empty.

For creating rules, these are the tasks we have performed:

The screenshot shows the Jira Automation interface for the 'E-Commerce Website' project. The 'Automation' tab is selected, displaying a list of rules. The 'Auto assignment' rule is highlighted, showing it was created by 'Yuvarekha' and is currently enabled. The interface includes a sidebar with navigation options like 'Details', 'Access', 'Notifications', 'Automation', 'Issue types', 'Features', 'Board', 'Toolchain', and 'Apps'. The main content area shows the 'Automation' settings with a search bar and a table of rules.

Name	Owner	Scope	Updated	Enabled	Actions
Auto assignment	Yuvarekha	E-Commerce Website	an hour ago	On	...
Blocking communication	Yuvarekha	E-Commerce Website	12 minutes ago	On	...
Single rule transition	Yuvarekha	E-Commerce Website	20 minutes ago	On	...
Sub task process	Yuvarekha	E-Commerce Website	an hour ago	On	...
Transition to Done	Yuvarekha	E-Commerce Website	40 minutes ago	Off	...
Transition to in progress	Yuvarekha	E-Commerce Website	30 minutes ago	Off	...

I have created auto assignment rule where I have created an issue and in case if assignee is empty, we have assigned the issue to the user who have triggered the issue with conditions and actions.



TASK 2:

Practice Activity

Create a new “E-Commerce website” project and automatically assign all new issues to the reporter

Automatically apply a sub-task template “Review category products”, “Add pictures”, “Match details”, “Publish” to any “Category creation” issue

Key skill

Create an automation rule with trigger, condition and action

Create issue sub-tasks components

Business goal

Ensure every issue has someone accountable for it

Match project management with business process using a sub-task template

Hint

The reporter is the person creating the issue. Create an automation rule triggered by issue creation if assignee is empty.

Trigger when the issue is created checking for “category creation” in issue summary with a condition, then add a direct action to create sub-tasks

Here, I have created automation rule for category creation summary with 4 sub-tasks with conditions.

yuva06usa.atlassian.net/jira/software/projects/ECW/settings/automation#/rule/20841929

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Sub task process **ENABLED**

When: Issue created
Rule is run when an issue is created

Summary contains
category creation

Then: Create 4 sub-tasks

+ Add component

Audit log Rule details Update Return to rules

Rule details
Required fields are marked with an asterisk *

Name * (required)
Sub-task process

Description
Add a description to your rule

Scope
E-Commerce Website
Scope can only be modified in the [global administration](#)

Owner * (required)
Yuvarekha

The owner will receive emails when the rule fails.

Action * (required)
Automation for Jira

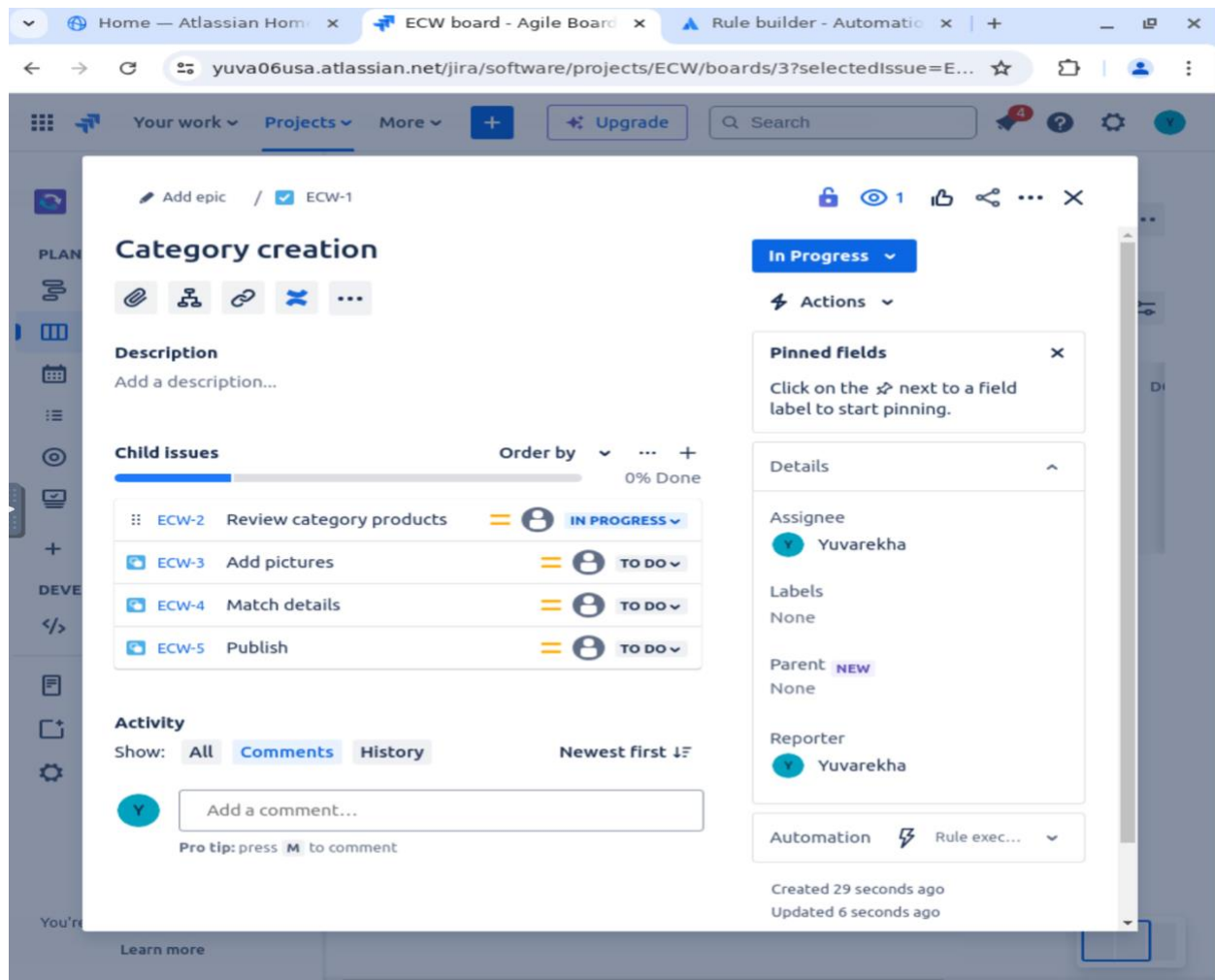
Actions defined in this rule will be performed by the user selected as the action. [Learn more about rule actions & automations](#)

Notify on error
E-mail rule owner once when rule starts failing after success

Who can edit this rule? * (required)
All admins

☐ Check to allow other rule actions to trigger this rule. Only enable this if you need this rule to execute in response to another rule.

Here, we can see the template for sub-tasks assigned for category creation.



TASK 3:

Practice Activity

Create a new "E-Commerce website" project and automatically assign all new issues to the reporter

Automatically apply a sub-task template "Review category products", "Add pictures", "Match details", "Publish" to any "Category creation" issue

Automatically transition any issue to "Done" if all sub-tasks are completed, or to "in progress" if at least one sub task is in progress

Key skill

Create an automation rule with trigger, condition and action

Create issue sub-tasks components

Apply automation rule branches, JQL and issue relationships

Business goal

Ensure every issue has someone accountable for it

Match project management with business process using a sub-task template

Keep issue status cleanly up to date

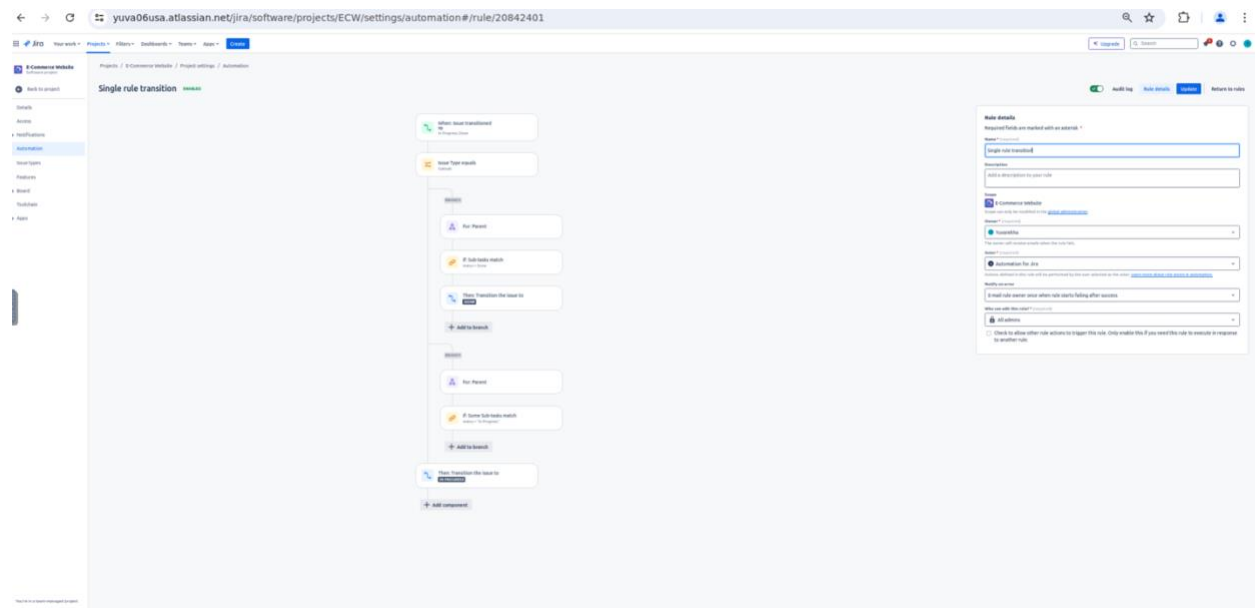
Hint

The reporter is the person creating the issue. Create an automation rule triggered by issue creation if assignee is empty.

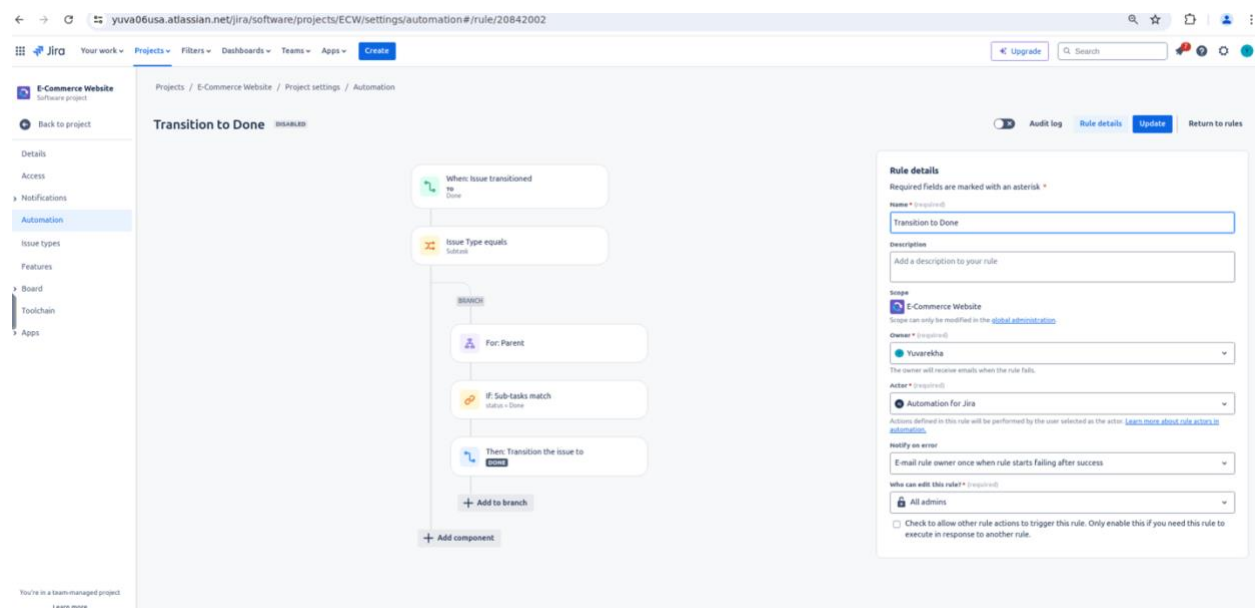
Trigger when the issue is created checking for "category creation" in issue summary with a condition, then add a direct action to create sub-tasks

Check parent-child relationship with branch and all sub-tasks matching JQL status = Done plus at least one matching JQL status = In Progress. Use if-else condition or separate rules.

Using single rule transition, I have created rule using rule branches, JQL (Jira Query Language, is a powerful query language used in Jira to search for and filter issues. It allows users to create complex queries to find specific issues within Jira projects) and issue relationships



Here, I have used transition to done rule if sub-tasks match.



Here, I have used transition to progress rule if some sub-tasks match.

yuva06usa.atlassian.net/jira/software/projects/ECW/settings/automation#/rule/20842293

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Transition to in progress disabled

When issue transitioned to In Progress

Issue Type equals Subtask

SEARCH

For: Parent

If Some Sub-tasks match status = "In Progress"

Then: Transition the issue to **in progress**

+ Add to branch

+ Add component

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Audit log Rule details Update Return to rules

Rule details

Required fields are marked with an asterisk *

Name*

Description

Scope

E-Commerce Website

Scope can only be modified in the [global administration](#)

Owner*

The owner will receive emails when the rule fails.

Actor*

Actions defined in this rule will be performed by the user selected as the actor. [Learn more about rule actors in automation.](#)

Notify on error

E-mail rule owner once when rule starts failing after success

Who can edit this rule*

☐ Check to allow other rule actions to trigger this rule. Only enable this if you need this rule to execute in response to another rule.

As a result, if we assign sub-tasks to done, in-progress works.

yuva06usa.atlassian.net/jira/software/projects/ECW/boards/3?selectedIssue...

Your work Projects Filters More Create Upgrade Search

Category creation 2

ECW-6

Attach Add a child issue Link issue Create

Description
Add a description...

Child issues

Issue ID	Task	Status
ECW-7	Review category products	DONE
ECW-8	Add pictures	DONE
ECW-9	Match details	DONE
ECW-10	Publish	IN PROGRESS

Order by 75% Done

Activity
Show: All Comments History Newest first

Add a comment...

Pro tip: press **M** to comment

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In Progress Actions

Pinned fields
Click on the ✨ next to a field label to start pinning.

Details

Assignee: Yuvarekha
Labels: None
Parent: None
Reporter: Yuvarekha

Automation Rule executions
Created 2 minutes ago
Updated 25 seconds ago
[Configure](#)

Here, we assign sub-tasks to in-progress also it works.

yuva06usa.atlassian.net/jira/software/projects/ECW/boards/3?selectedIssu...

Your work Projects Filters More Create Upgrade Search

Add epic / ECW-6

Category creation 2

Attach Add a child issue Link issue Create ...

Description
Add a description...

Child issues Order by 0% Done

ECW-7	Review category products	IN PROGRESS
ECW-8	Add pictures	IN PROGRESS
ECW-9	Match details	IN PROGRESS
ECW-10	Publish	IN PROGRESS

Activity
Show: All Comments History Newest first

Add a comment...
Pro tip: press **M** to comment

Pinned fields
Click on the next to a field label to start pinning.

Details

Assignee Yuvarekha
Labels None
Parent NEW None
Reporter Yuvarekha

Automation Rule executions
Created 2 minutes ago
Updated 4 seconds ago
Configure

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TASK 4:

Practice Activity

Create a new "E-Commerce website" project and automatically assign all new issues to the reporter

Create an automation rule with trigger, condition and action

Ensure every issue has someone accountable for it

The reporter is the person creating the issue. Create an automation rule triggered by issue creation if assignee is empty.

Automatically apply a sub-task template "Review category products", "Add pictures", "Match details", "Publish" to any "Category creation" issue

Create issue sub-tasks components

Match project management with business process using a sub-task template

Trigger when the issue is created checking for "category creation" in issue summary with a condition, then add a direct action to create sub-tasks

Automatically transition any issue to "Done" if all sub-tasks are completed, or to "in progress" if at least one sub task is in progress

Apply automation rule branches, JQL and issue relationships

Keep issue status cleanly up to date

Check parent-child relationship with branch and all sub-tasks matching JQL status = Done plus at least one matching JQL status = In Progress. Use if-else condition or separate rules.

Whenever a new task is blocked by another, send an email to the owner of the blocking task asking urgent action

Use smart values

Ensure communication and immediate action to speed up business execution

Use {{issue.key}} and {{issue.summary}} smart values with a "send email" action.

Here, I have used block communication rule to send an email.

← → ↻ yuva06usa.atlassian.net/jira/software/projects/ECW/settings/automation#/... ☆ | 👤 ⋮

⌵ ⌵ Your work ▾ Projects ▾ Filters ▾ More ▾ Create Upgrade Search 🔍 ? ⚙️ 👤

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Blocking communication ENABLED ✔️ [Audit log](#) [Rule details](#) [Update](#) [Return to rules](#)

When: Issue linked
Types: Blocks

Then: Send email
Assignee: Issue { {issue.key} } is blocking { { destinationissue.key } }

+ Add component

Send email 📧 🗑️ ?

To * (required)
Assignee x ▾

Cc **Bcc**

Subject * (required)
Issue { {issue.key} } is blocking { { destinationissue.key } }

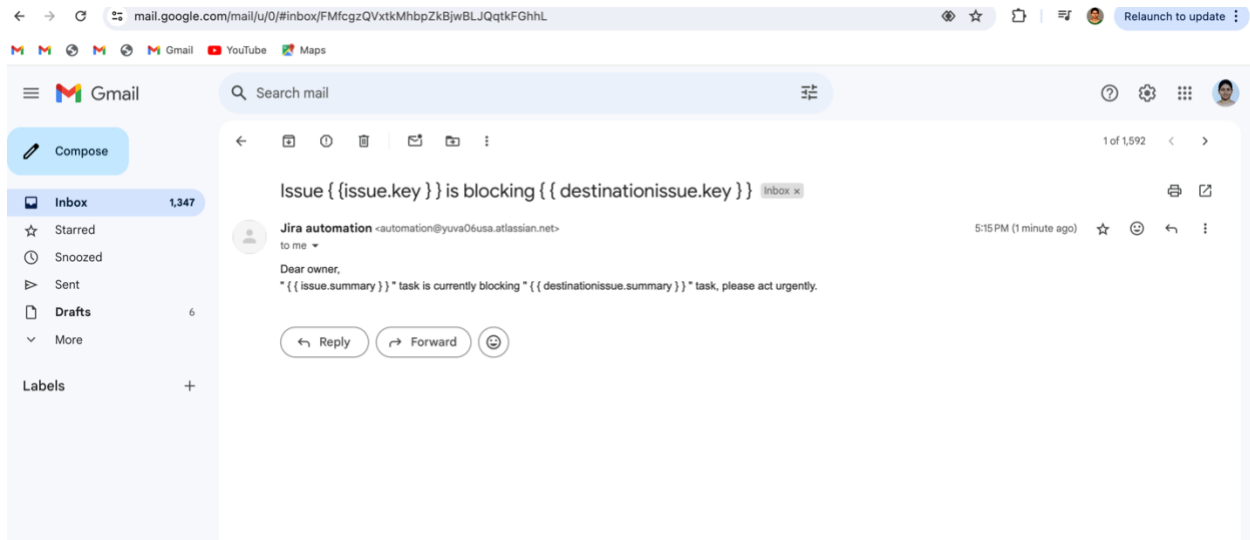
Content * (required)
Dear owner,
" { {issue.summary} } " task is currently blocking " { { destinationissue.summary} } " task, please act urgently.

> More options

Back Next

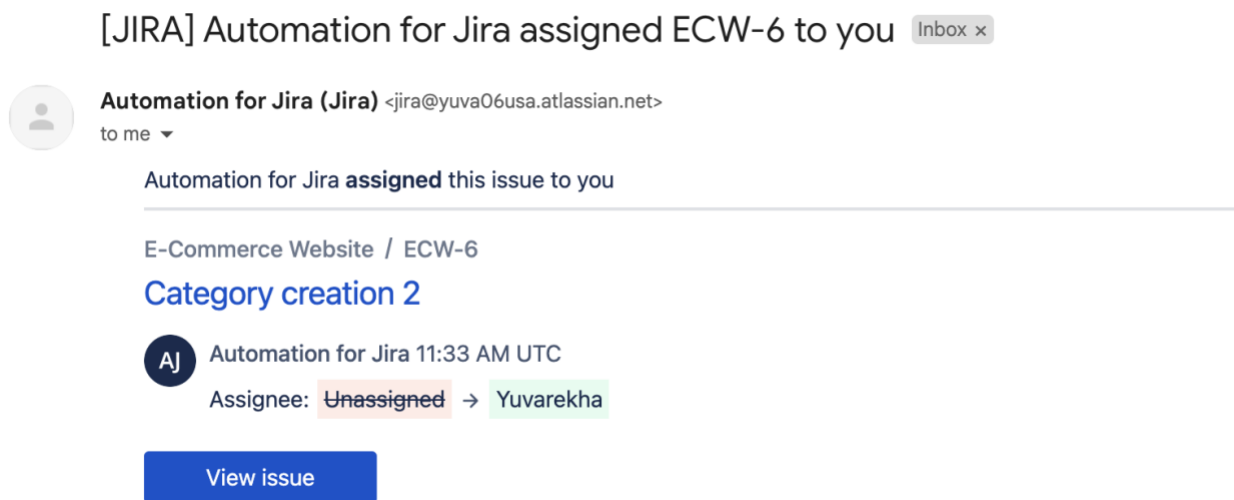
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As a result of doing this, an email is received.



Additional results found through this project:

Have received email notification for sub-tasks assigned for category creation in the below 2 screenshots.



[JIRA] Automation for Jira assigned ECW-1 to you Inbox x



Automation for Jira (Jira) <jira@yuva06usa.atlassian.net>

to me ▾

Automation for Jira **assigned** this issue to you

E-Commerce Website / ECW-1

Category creation



Automation for Jira 11:24 AM UTC

Assignee: **Unassigned** → Yuvarekha

[View issue](#)

This screenshot shows the tasks in in-progress condition and done condition

The screenshot displays the Jira interface for the 'E-Commerce Website' project. The left sidebar shows navigation options under 'PLANNING' (Timeline, Board, Calendar, List, Goals, Issues, Add view) and 'DEVELOPMENT' (Code, Project pages, Add shortcut, Project settings). The main area shows the 'ECW board' with a search bar and a 'GROUP BY' dropdown set to 'None'. The board is divided into three columns: 'TO DO', 'IN PROGRESS 1', and 'DONE 1'. The 'IN PROGRESS 1' column contains a task 'Category creation 2' with a checkbox for 'ECW-6' and an assignee icon. The 'DONE 1' column contains a task 'Category creation' with a checkbox for 'ECW-1' and an assignee icon. The 'TO DO' column has a '+ Create issue' button.