

# Lab: Issue Types (Company-managed)

Estimated time: 30 minutes

In this lab, you will:

1. Create issues of different types.
2. Create subtasks.
3. Add a custom issue type to your project.
4. Create a swimlane for the custom issue type.

*Note: These instructions assume that you have Jira Administrator permission. They also assume that you created a company-managed kanban project named `projectA` in an earlier lab.*

*These instructions DO NOT APPLY to team-managed projects.*

## 1: Create issues of different types.

1. Navigate to your `projectA` company-managed kanban project.
2. If your kanban board has a separate backlog (a **Backlog** tab), move the backlog back to the board using the **Columns** tab under board settings. This is so you can see the issues on the board when you create them.
3. Create an issue with a summary/title named `add item 4` (or the next item number on your board). Assign an **Issue Type** of `Story` to the issue.
4. Create an issue with a summary/title named `fix bug 1`. Assign an **Issue Type** of `Bug` to the issue.
5. Create an issue with a summary/title named `complete task 1`. Assign an **Issue Type** of `Task` to the issue.
6. Move the issues through some of the statuses on the board. Notice that they all behave in the same way, because they all use the same workflow.

*Congratulations, you have created issues of different types.*

## 2: Create subtasks.

1. Using the same procedure as in the previous step, try to create an issue with an issue type of `Subtask`. Notice that this option is not available. This is because subtasks must have a parent issue. **Cancel** the attempt to create this issue.
2. From the board, open the `add item 4` issue. Click on **Create subtask** to create a subtask for this story.
3. Create a subtask with a summary/title of `add item 4a`. Notice that a new issue key and status are assigned to the subtask.
4. Create another subtask with a summary/title of `add item 4b`.
5. View the board. Notice that the subtasks have been added under the `add item 4` story in the `BACKLOG` status, independent of the status of the parent issue.
6. Move the subtasks to different statuses. Notice that subtasks have independent statuses.

7. On the project's sidebar, select **Issues and filters** to view the issues of the project. Click on **All issues**. Notice that the subtasks are shown in the list. Subtasks are issues- they just need to have a parent issue.
8. Select the `add item 4b` subtask. Click the more icon (...) on the right to bring up a menu. Convert the subtask to an issue by selecting **Convert to Issue**. Select `Story` as the new issue type. Select the defaults for other values and click **Finish** to convert the issue. Notice by the icon that what was a subtask is now a story.
9. View the kanban board. Move the `add item 4` story to the `Selected for Development` status. Move the `add item 4a` subtask to the `Done` status. Jira should notice that all of the subtasks for the story are done and ask you if you want to update the parent issue to match the status. Click **Update** to move the parent issue to the `Done` status.
10. Add subtasks to the `fix bug 1` and `complete task 1` issues. Notice that subtasks for bugs and tasks behave the same way as with stories.

*Congratulations, you have created subtasks.*

### 3: Add a custom issue type to your project.

*Custom issue types allow your team to create issues that are appropriate for the types of work that the team does.*

1. With your `projectA` project selected, click **Project settings** from the sidebar.
2. Click on **Issue types**. You are shown the issue type scheme for your project. An issue type scheme is the collection of issue types used by your project. You should see the default issue types for company-managed kanban projects. (These are also the default issue types for company-managed scrum projects.)
3. In the upper-right corner, click **Actions**, then select **Edit issue types**.
4. Notice that the default issue type is `Story`. This is the issue type that will be selected by default when you first create an issue. View the order of the issue types under **Issue Types for Current Scheme**. You can rearrange these to change the order of the types in Jira dialogs.
5. In the upper right corner, click **+ Add issue type**. Name the type `Small`. Add a description of `A work item that is tracked but takes a small amount of time to complete.` For the **Type**, keep the current value of **Standard Issue Type**. Click **Add** to add the issue type to your project. You should now see your custom issue type at the bottom of the list on the left. You can rearrange the order if you would like.
6. Click **Save** to save your issue type scheme.
7. Change the avatar (icon) of your issue type.
  - o Because an issue type can be used by any project, the configuration is under the Jira application settings. To reach Jira settings, click on the gear icon near your user avatar.
  - o Click **Issues**, and then **Issue types**.
  - o Click the **Edit** link to the right of the `Small` issue type.
  - o Click **select image** to change the issue type avatar.
  - o Select the minus (-) sign, or upload your own avatar for your issue type.

- Click **Update** to update the avatar for your issue type. The `Small` issue type should now have the new icon.
8. Navigate back to your `projectA` project. Create an issue of type `Small` named `small item 1`. View the item on the kanban board. Notice your icon. Open the issue and notice that you can add subtasks to the issue.

*Congratulations, you have added a custom issue type to your project.*

#### 4: Create a swimlane for the custom issue type.

1. Use basic search to search for issues of your new custom type. There should be a single issue. Switch to JQL search and view the query. **Copy** the query to your clipboard.
2. Navigate to the **Swimlanes** tab under the the `projectA` board's settings.
3. Explore the **Base Swimlanes on** dropdown to view the options for swimlanes. For example, you can create swimlanes for each team member easily by selecting `Assignees`.
4. Under **Base Swimlanes on** select **Queries**.
5. Add a swimlane named `Small Tasks`, paste the JQL `issuetype = Small` and a description of `Issues that should be tracked but take a small amount of time.`. Make sure to click `Add`.
6. View your swimlane on the board.
7. Experiment with other swimlanes.

*Congratulations, you have created a swimlane for the custom issue type and completed this lab.*