

TUTORIAL

Auto-create sub-tasks and update fields in Jira

This guide reveals how to create a Jira automation rule that automatically creates sub-tasks when an issue is created.



BY KEV ZETTLER

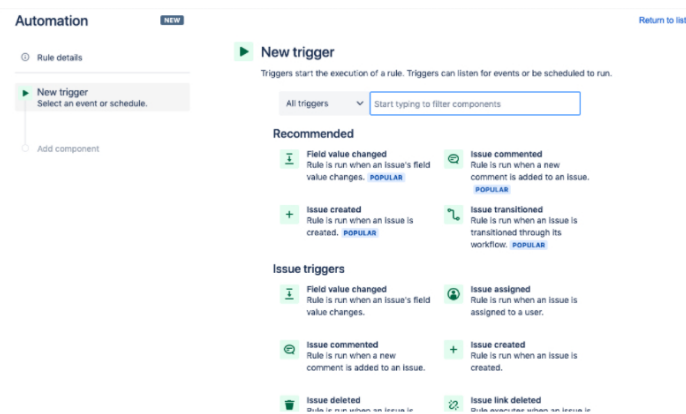
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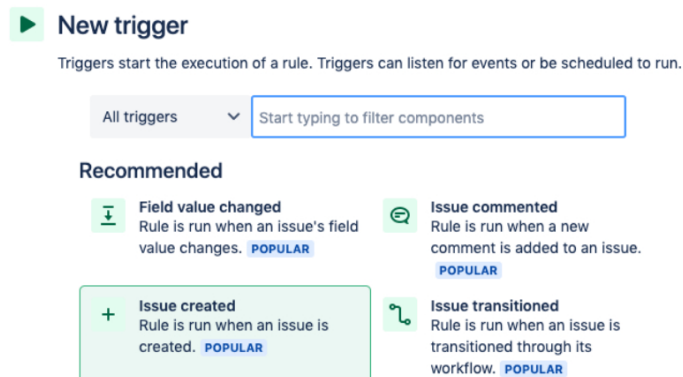
Automation rules in Jira help teams move fast and stay organized. Explore the [automation template library](#), and read on to start automating in Jira!

New Trigger

The first step is to select a trigger from the **New trigger** selection screen.



Next, find the **Issue created** trigger from the list of triggers



You can also find the **Issue created** trigger by searching for it in the search bar. Once you have selected the **Issue created** trigger, click the **Save**

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selected the **Issue created** trigger, click the **Save** button.

[Return to list](#)

Issue created

Rule is run when an issue is created. This trigger needs no configuration.

Cancel

Save

New Condition

Next we will add a **New condition** component that will perform an action if the issue type is a Task. Click on the **New Condition** option on the **Add component** page.

Automation NEW [Return to list](#)

Rule details

When: Issue created

Rule is run when an issue is created.

Add component

Add component

Components can either restrict execution by testing a condition, perform an action, or control flow by branching on related issues.

New condition

Actions will only execute if all conditions preceding them pass.

New action

Actions perform changes to a system.

Branch rule / related issues

Branch rule and run conditions & actions for these issues.

Next, click the **Issue fields condition**:

Automation NEW [Return to list](#)

Rule details

When: Issue created

Rule is run when an issue is created.

If: New condition

Select a condition to narrow the scope of your rule.

Add component

New condition

Actions will only execute if all conditions preceding them pass.

Recommended

Issue fields condition

Check whether an issue's field meets a certain criteria

POPULAR

All components

Advanced compare condition

Compares two values: ((issue.status.name)) equals Done

Issue attachments

Checks if issue attachments exist or don't exist

JQL condition

Checks if issue matches JQL. Learn more. priority > Medium

User condition

User matches criteria: Reporter in group 'customers'

If / else block

Perform different actions using if, else-if and else to control the flow.

Issue fields condition

Check whether an issue's field meets a certain criteria

Related issues condition

Check if related issues exist or match JQL.

This will direct you to the **Issue fields condition** configuration page. From the **Field** drop down, select **Issue Type**, change the Value to **Task**, and click the **Save** button.

[Return to list](#)

Issue fields condition

Checks whether an issue's field meets a certain criteria. [Learn more.](#)

Field *

Issue Type

Condition *

equals

Value

Field

☒ Task

Cancel

Save

New Action

To add an action to the rule, click on the **New action** item on the **Add component** page and filter for the **Create sub-tasks** action. Click the **Create sub-tasks** item to proceed.

[Return to list](#)

New action

Actions perform changes to a system.

All actions

Issue actions

☒ **Create sub-tasks**
Add a number of sub-tasks to a given issue.

> Can't find what you're looking for here?

[Cancel](#)

On the **Create sub-tasks** page add one or more sub-tasks by clicking the **Add another sub-task** and fill in the **Summary** fields as you like. You can also configure the fields that you'd like in each sub-task.

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Create sub-tasks

Type	Summary		
1. <input checked="" type="checkbox"/> Sub-task	<input type="text" value="One"/>	Add fields	Remove
2. <input checked="" type="checkbox"/> Sub-task	<input type="text" value="Two"/>	Add fields	Remove
3. <input checked="" type="checkbox"/> Sub-task	<input type="text" value="Three"/>	Add fields	Remove

[+ Add another sub-task](#)

[Cancel](#) [Save](#)

> How can I add more fields when creating a sub-task?

> Can I include issue data in my sub-tasks?

When you click **Add fields** on the third sub-task the other two sub-tasks will be created as a separate action. You will be taken to a new **Create Issue** screen where you can configure additional fields. Click the **Save** button when finished.

Automation NEW [Return to list](#)

[Rule details](#)

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

Issue Type equals Task

Then: Create 2 sub-tasks

And: Create a new Sub-task
☒ kevzettler (KEV)

[Add component](#)

Create issue

Create a new issue in:

Project *
☒ kevzettler (KEV)

Issue type *
☒ Sub-task

Parent issue *
Current issue
The current issue will be the same as the trigger issue unless this create action is on a related issues branch.

[Choose fields to set...](#)

Summary *

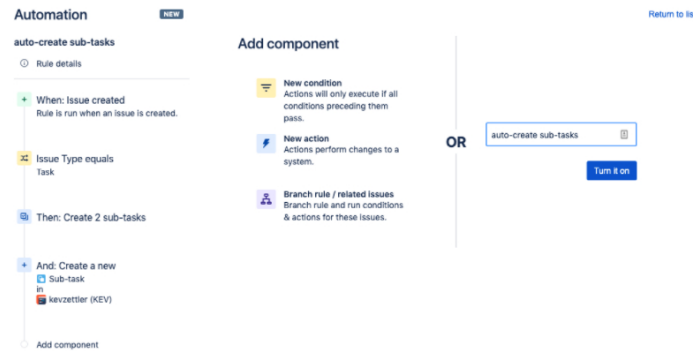
Description

[More options](#)

[Cancel](#) [Save](#)

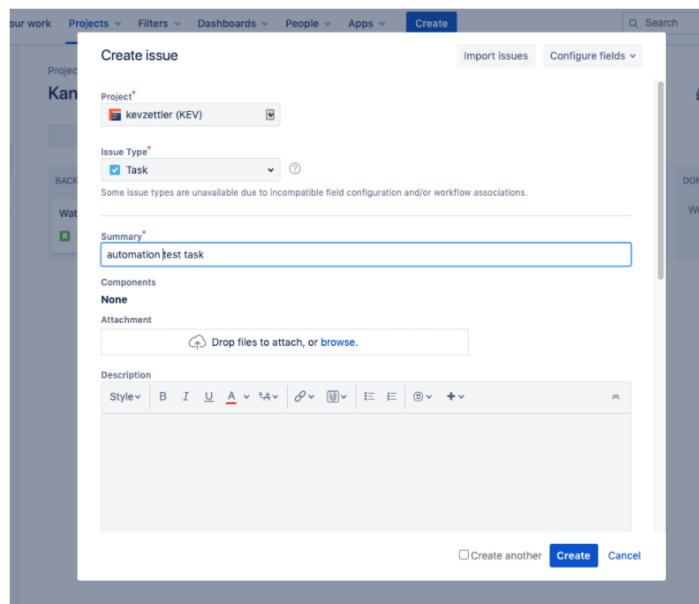
Turn it on

This brings you to the **Add component** view where you can name the new Automation. Once you do, click the **Turn it on** button.



Try it out

Now that you created and activated a new automation rule, it's time to try it out! Go back to your project, create a new issue, and set the type to Task.



Once you've created the new task, the automation rule will activate in the background. You can confirm if the automation rule succeeded by visiting the **Audit Log**. Navigate to **Project Settings -> Automation**, find your new Automation rule, and click the **Audit Log** tab. You should see a view similar to the following:

