

TUTORIAL

Automatically assign created issues based on criteria in Jira



BY KEV ZETTLER

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You can create a Jira automation rule by using an if/else condition, which automatically assigns issues to groups of users based on their issue types.

Navigate to the **Automation** tab of your **project settings** in Jira. In the rules tab, click on **Create rule** in the top right corner of the screen. On the **New trigger** screen select **Issue created** and click **Save**.

The screenshot shows the 'New trigger' screen in Jira's Automation interface. At the top, there's a search bar labeled 'Start typing to filter components'. Below it, a list of recommended triggers includes 'Field value changed', 'Issue commented', and 'Issue created'. The 'Issue created' option is highlighted with a green box and a plus sign, indicating it has been selected.

On the Add component screen, click **New condition**.

The screenshot shows the 'Add component' screen in Jira's Automation interface. It lists several options: 'New condition' (selected and highlighted with a yellow box), 'New action', 'Branch rule / related issues', and 'Branch rule and run conditions & actions for these issues'. The 'New condition' option is described as 'Actions will only execute if all conditions preceding them pass.'

On the **New condition** screen select the **if/else block** option. This creates a condition that initiates an action depending on criteria in the automation rule.

The screenshot shows the 'New condition' screen in Jira's Automation interface. It lists several condition types: 'Issue fields condition' (selected and highlighted with a yellow box), 'Advanced compare condition', 'Issue attachments', and 'Issue fields condition'. The 'If / else block' option is described as 'Perform different actions using if, else-if and else to control the flow.'

PRODUCT DISCUSSED

Jira Software

Save time and deliver value faster with automation

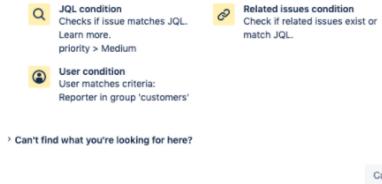
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On the **If block** screen, click **Add Conditions...**

If block

The if block executes the actions within that block when the all specified conditions matches. Otherwise, the following else blocks will be evaluated.

[+ Add conditions...](#)

In the **If Block** screen, select the **Issue fields condition** option.

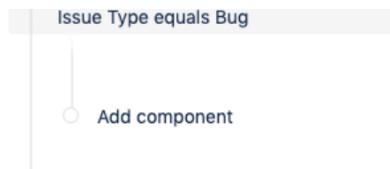
The screenshot shows the 'If block' configuration screen. On the left, there's a tree view with 'When: Issue created' expanded, showing 'If: matches' (selected), 'Add component', 'Add else', and 'Add component'. On the right, a modal window titled 'If block' displays a list of condition types. The 'Issue fields condition' is highlighted with a yellow box. Other options include 'Advanced compare condition', 'Issue attachments', 'JQL condition', and 'User condition'. At the bottom of the modal are 'Cancel' and 'Save' buttons.

For this demo we set the condition for **Issue Type > equals > Bug**. Be sure to click **Save**.

The screenshot shows the 'If block' configuration screen with the 'Issue fields condition' set to 'Issue Type equals Bug'. The 'Field' dropdown is set to 'Issue Type', 'Condition' to 'equals', and the 'Value' dropdown is set to 'Bug'. The 'Save' button is visible at the bottom right of the modal.

Next, add an action that assigns bugs to a certain group of users. On the left sidebar, which has a summary of the automation rule, click the **Add component** text underneath the **If:matches** condition.

If: matches



You will be prompted for a **New component**. Click **New Action**.

Automation NEW

New component

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

New action Actions perform changes to a system.

Branch rule / related issues Branch rule and run conditions & actions for these issues.

On the **New Action** screen search for and click the **Assign issue** option.

Automation NEW

New action

Actions perform changes to a system.

All actions assi

Recommended

Edit issue Update certain issue fields. POPULAR

Issue actions

Assign issue Select a user to assign the issue to.

Edit Issue Update certain issue fields.

From the **Assign issue** prompt, select a user who will be assigned issues. Click the **Save** button.

Automation NEW

Assign issue

There are numerous ways to assign issues to users - from specifying the user, to copying from other issues and fields. You can also assign to users in a list based off smart criteria. Learn more about the different options for assigning issues.

Assign the issue to

Specify user

Select a user

Kev Zettler

Cancel Save

Next you can add an **if/else** condition to the **If:matches** condition. If the condition in the **If block** does not match, then the rule will evaluate the **Else block**. Click on the **Add else** text on the left sidebar.



You will be brought to the **Else block** screen. Click the **Add conditions** text and select another **Issue fields condition**.

The screenshot shows the Jira Automation interface with the 'Else' block selected. On the left, there's a tree view of the automation steps: 'When: Issue created', 'If: matches Issue Type equals Bug', 'Then: Assign the issue to Kev Zettler', 'Add component', and the 'Else' block. The 'Else' block has three 'Add component' options. On the right, a modal window titled 'Else block' is open, showing a list of condition types. One condition, 'Issue fields condition', is highlighted with an orange border. Other visible condition types include 'Advanced compare condition', 'Issue attachments', 'JQL condition', 'Related issues condition', and 'User condition'. Below the condition types is a button '+ Add conditions...' and a 'Save' button at the bottom right.

Add a new condition to the **Else-if block**. The example below demonstrates how to add a new **Else-if** condition that is activated when the issues type value equals **Task**.

This screenshot shows the same Jira Automation interface as the previous one, but with a different configuration. The 'Else-if: matches Issue Type equals Task' step is now selected. Its configuration dialog is open on the right, showing a detailed 'Issue fields condition' setup. The condition is set to check if 'Issue Type' equals 'Task'. The dialog also includes sections for 'Field*', 'Condition*', and 'Value'. Below the configuration is a '+ Add conditions...' button and a 'Save' button.

Repeat the steps to add an action to the **Else-if** condition. The example below illustrates how to create an additional action that assigns the issue to another user.

Automation

NEW

① Rule details

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

- If: matches
Issue Type equals Bug

Then: Assign the issue to
 Kev Zettler

Add component

- Else-if: matches
Issue Type equals Task

Then: Assign the issue to
 kevin Zettler

This rule has **If** and **Else-if** conditions that checks for a certain type of issue so that subsequent actions are performed once either condition matches. Next, fill in the remaining **Else** condition with another action. Click on the **add else** text located on the rule details sidebar then click the Save button. Repeat the above steps for adding an **Assign issue** action to the new **Else** condition.

The example below reveals how to set the **Assign issue** action to automatically assign the issue to a user in a list.

Automation NEW [Return to list](#)

① Rule details

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

- If: matches
Issue Type equals Bug

Then: Assign the issue to
 Kev Zettler

Add component

- Else-if: matches
Issue Type equals Task

Then: Assign the issue to
 kevin Zettler

Add component

Assign issue

There are numerous ways to assign issues to users - from specifying the user, to copying from other issues and fields. You can also assign to users in a list based off smart criteria. Learn more about the different options for assigning issues.

Assign the issue to

A user in a defined list

Method to choose assignee

Balanced workload

JQL to restrict issues

statusCategory != Done

Insert account id Resolve users Validate query

The issue will be assigned to the user with the least amount of open issues assigned to them as defined by the JQL. If multiple users have the same count, one will be randomly selected. For project scoped rules, only issues in that project will be counted.

User list*

Kev Zettler kevin Zettler Automation for Jira

Maximum 50 users

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

This **Assign issue** demonstrates the **Balanced**

workload assignment that automatically assigns the issue to users in the list. The **Balanced workload** assignment evenly distributes assignments so that a user in the list is not assigned more issues than the others. Once you configure the new **Assign issue** action, click the **Save** button.