TUTORIAL

Automatically keep epics and stories in sync in Jira

Learn how to create a Jira automation rule that keeps epics and stories in sync with their parent issues.

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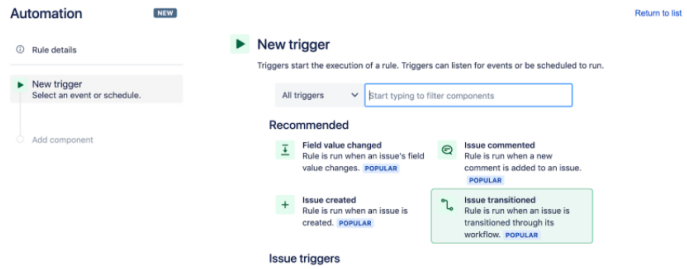
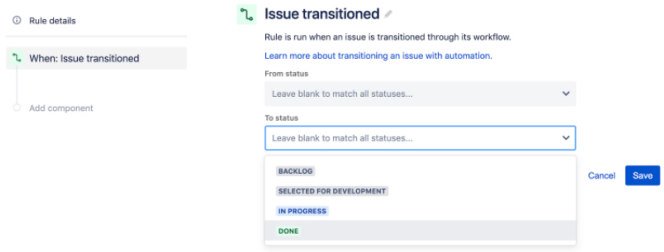
This guide demonstrates how to create a Jira automation rule that keeps epics and stories in sync with their parent issues. This is an example of a Branch rule component that applies actions to related issues, such as sub-tasks. This guide assumes you have an active Jira project.

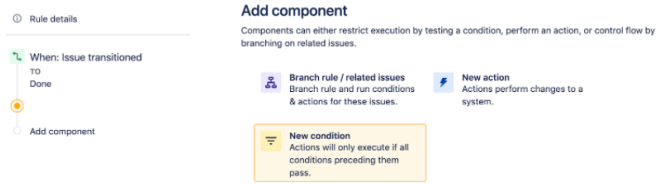
In the **Rules** tab, click on the **Create rule** button at the top right corner of the screen. In our example rule below the **Issue Transitioned** trigger was selected.



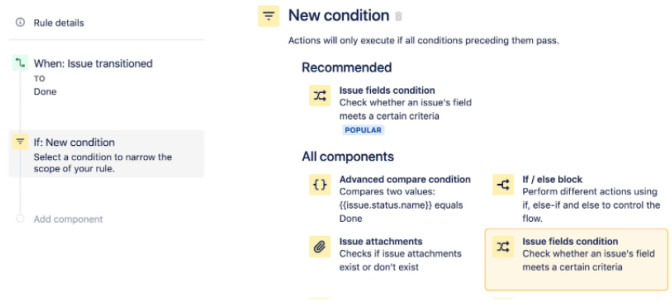
On the **Issue Transitioned** screen, select the status trigger to execute a rule, then click save. In the below example the rule to be executed is "DONE".



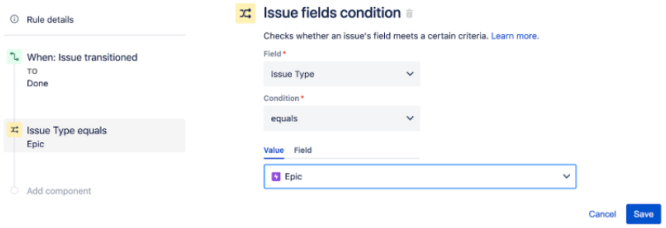
Next, on the **Add Component** screen click the **New condition** option.



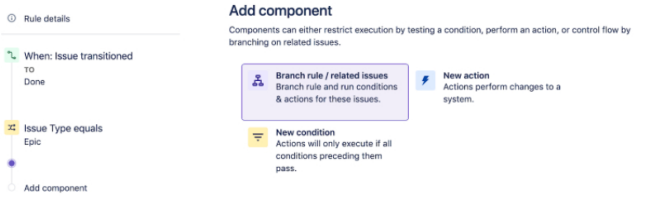
On the **New Condition** screen select **Issue fields condition.**



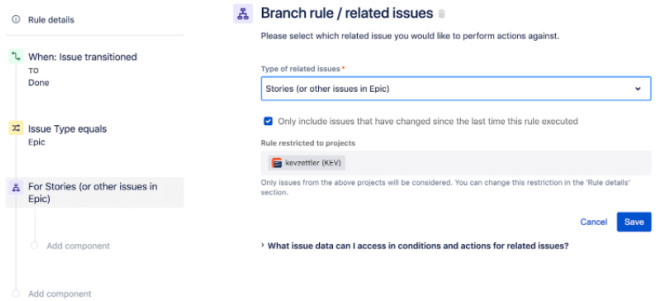
On the **Issue Field Condition** screen configure the condition to act on “epic” then click the save button. The configuration should look like the following:



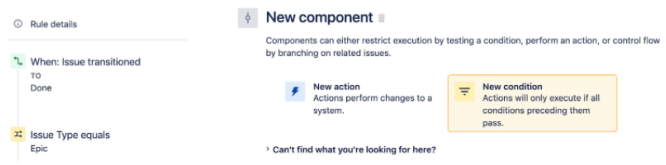
Once you click the save button you will return to the **Add component** screen. The next component we will select is the **Branch rule / related issues** option.

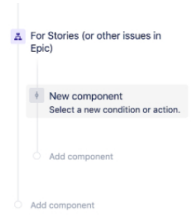


On the **Branch rule / related issues** screen, select the branch rule type of related issues to **Stories** (or other issues in Epic) and then click the **Save** button.

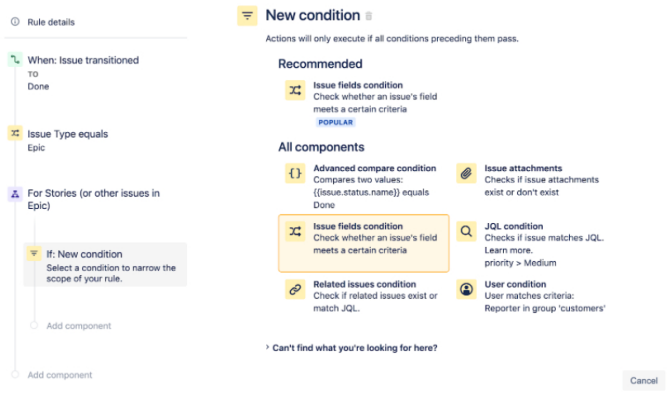


This rule will now search if an epic has associated stories and perform actions on these instead of the trigger issue. Next, we will add a component underneath the For Stories branch. Select the **New condition** option.

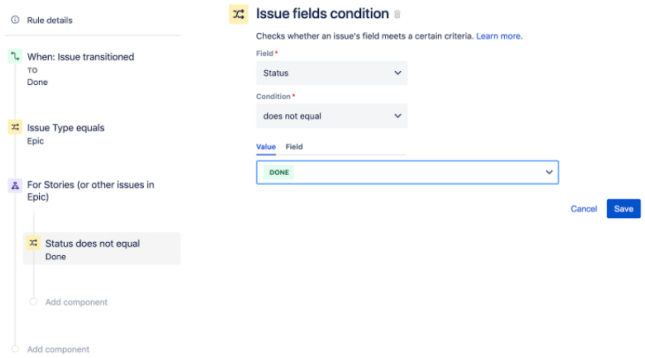




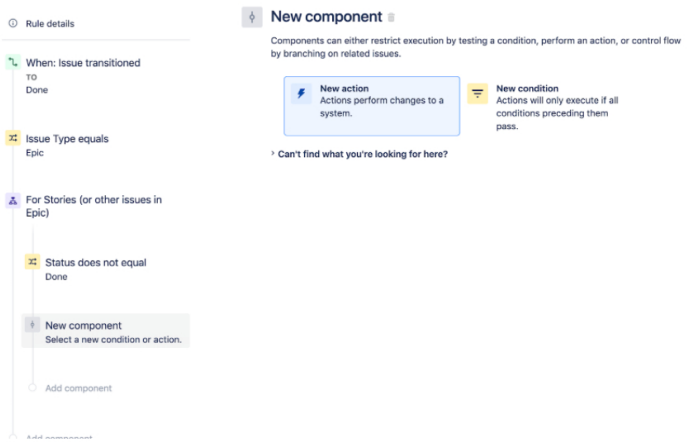
On the **New condition** screen, select the **Issue fields condition** option.



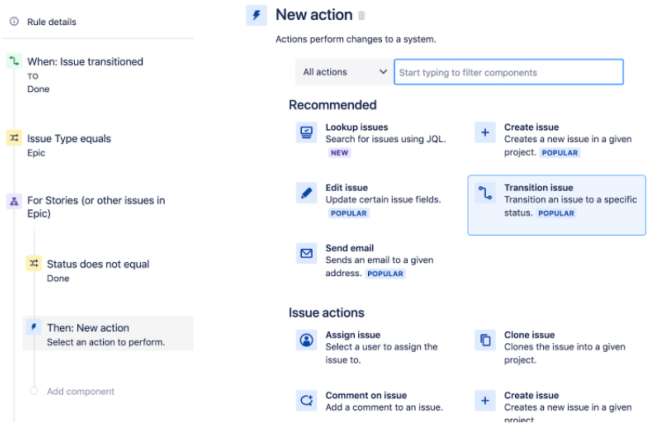
Configure the **Issue fields condition** so the **Status does not equal DONE**. This ensures the rule only targets stories underneath an Epic with a status that is not done. The following illustration shows the configuration of the issue fields condition. Once configured, click the **Save** Button



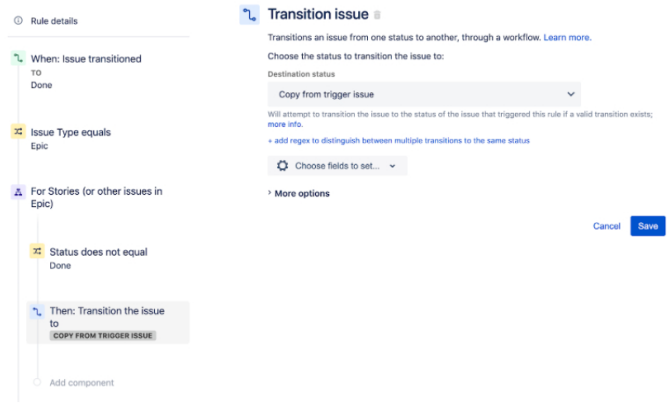
Next, you can add **New action** to the new issue field condition. Click **New Component** on the left **Rule details** sidebar. Select **New action** on the new component screen.



We will use a **Transition issue** action for the **New action**. Select the **Transition issue** action to advance.



Configure the **Transition the issue** action to set the destination status from the trigger issue. This sets the story issues status to the parent epic. The transition issue action should look like the illustration below. Click **Save** to continue.



This fully configured the rule. The left sidebar **Rule summary** should look like the following: