Jira rules are a function within Jira Software that enables you to automate certain actions in accordance with specific criteria you've fed into the system.

Rules are useful since they save product teams time on repetitive tasks and help them organize workflow.

Issues are items that represent a task, activity, or pending job that the product team must complete along the roadmap. Subtasks are individual tasks that a team has to do to accomplish a larger, primary task.

In this tutorial, we walk you through how to generate subtasks for issues with rules within Jira software.

Let's dive in.

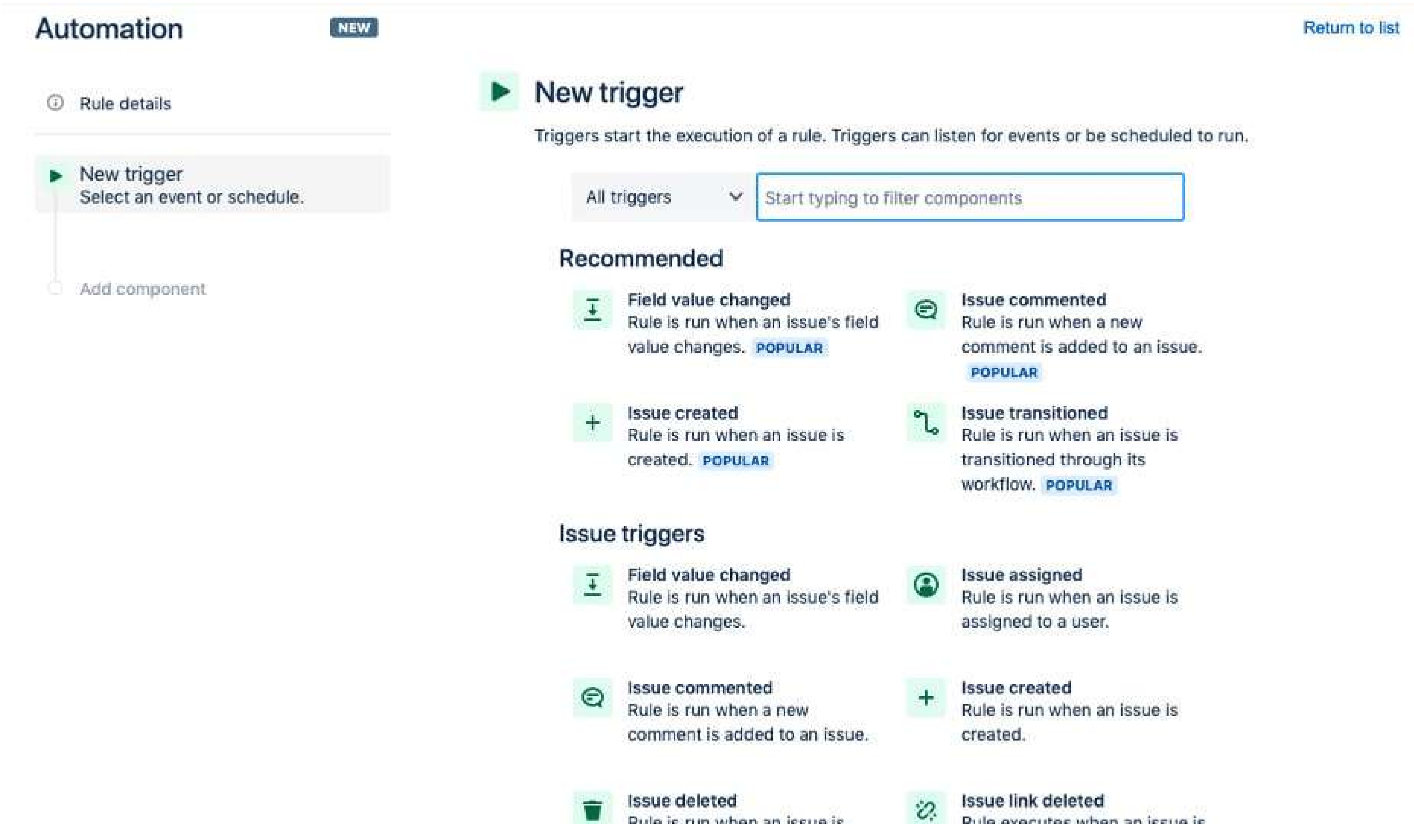
5 Steps to Build Jira Rules for Issues

In order to create a Jira rule that helps teams tackle issues by creating subtasks for each one, one must carry out the following five steps.

Let's dive into each one.

Step 1: Create a new Trigger

The first step in the process is to navigate to your Jira dashboard and choose a trigger from the 'New Trigger' pop-up on your screen.

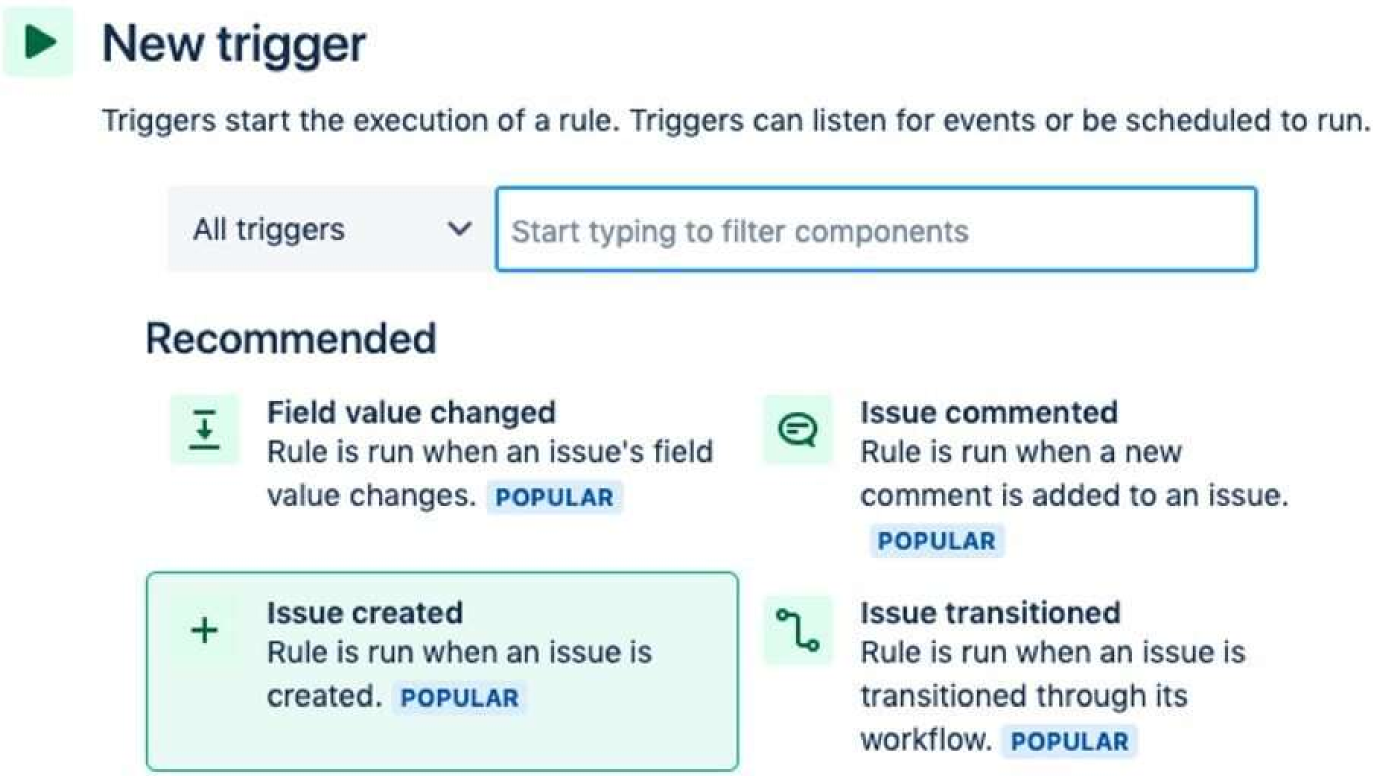


Credit: Atlassian

A trigger is a term in marketing automation that refers to something that initiates the rollout of a rule. Product managers have the option to automate those triggers based on a set temporal schedule or activate them only when specific events or activities take place.

From the drop-down on your screen, a section labeled ‘Recommendations’ appears. These recommendations correspond to alternative options for trigger creation and management with each one serving a unique purpose.

However, for this tutorial, we skip past the ‘Recommendations’ section and head to the ‘Issue Created Trigger’. You find this option in the drop-down list of triggers.

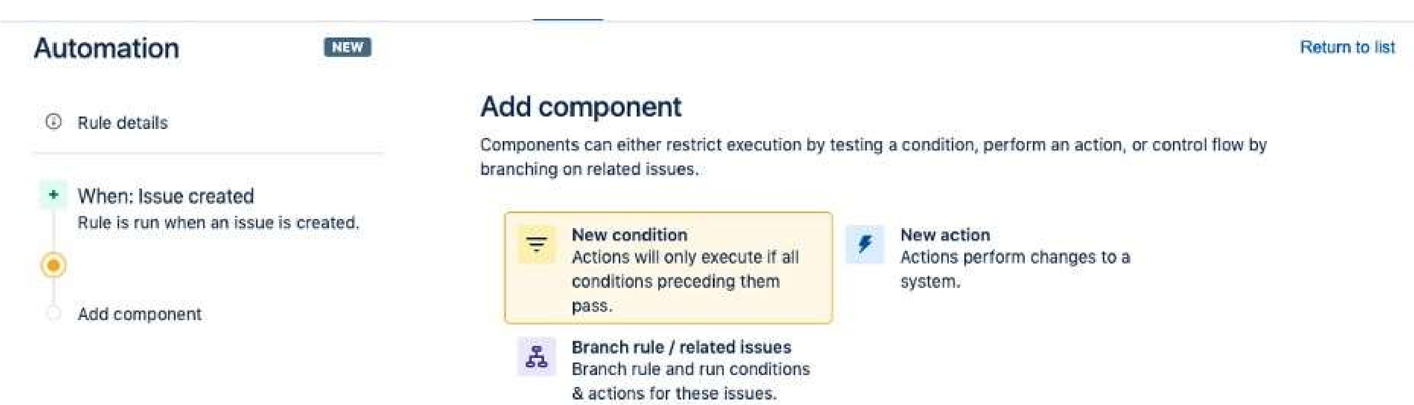


Credit: Atlassian

Once you have found the trigger, select it and press 'Save'.

Step 2: Create a new Condition

Once you have clicked 'Save', the next step in the process is to create a 'New Condition'. New conditions are components within Jira Software automation tool. These components carry out a programmed activity when you have labeled an issue as a 'Task'.


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.

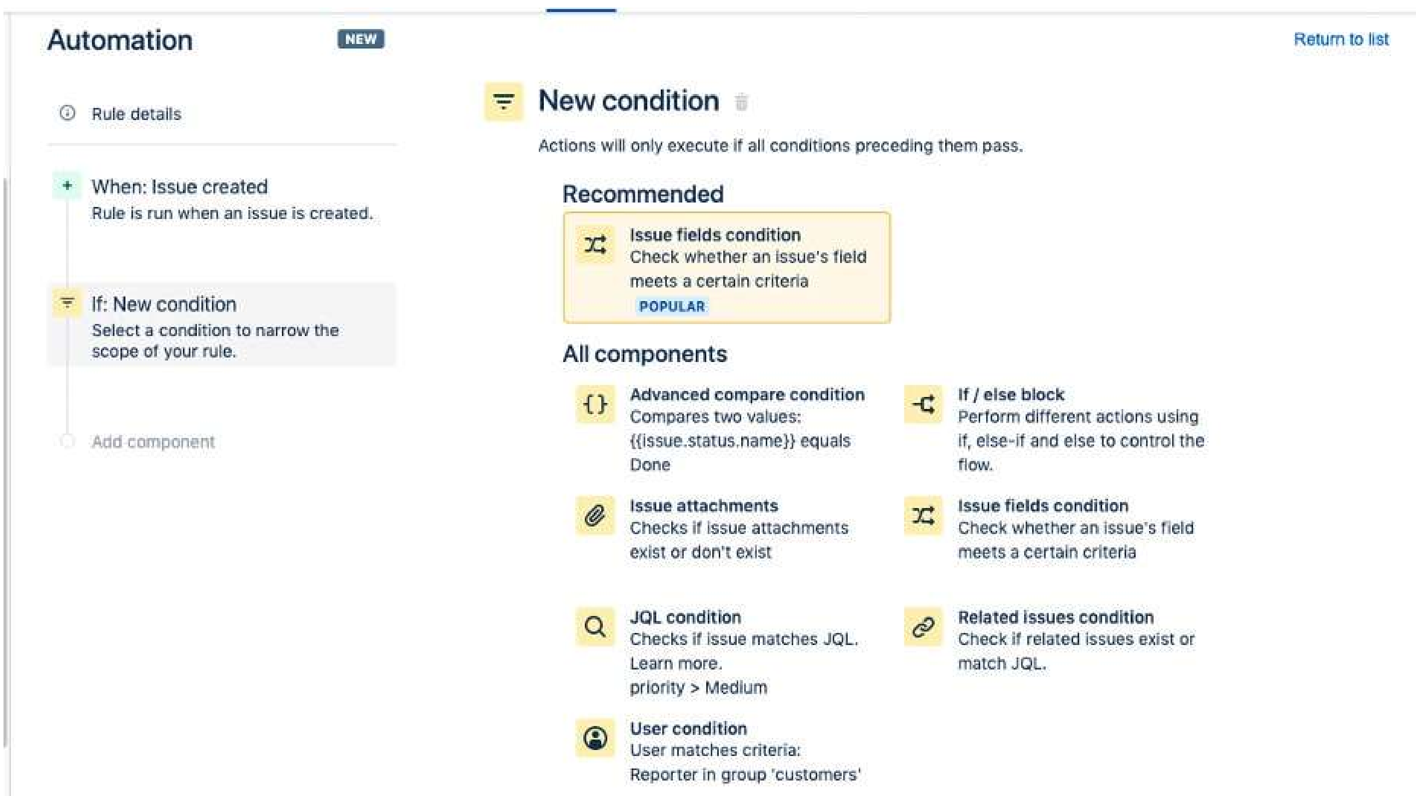
Credit: Atlassian

Issues are batches of work that represent pending tasks, jobs, or activities that float around project workflows until their completion. Issues have subtasks that you assign to the rest of the team and track on an individual basis.

Jira conditions enable you to refine your rules' scope based on your requirements. If a rule does not meet the condition you've set for it, the rule does not run.

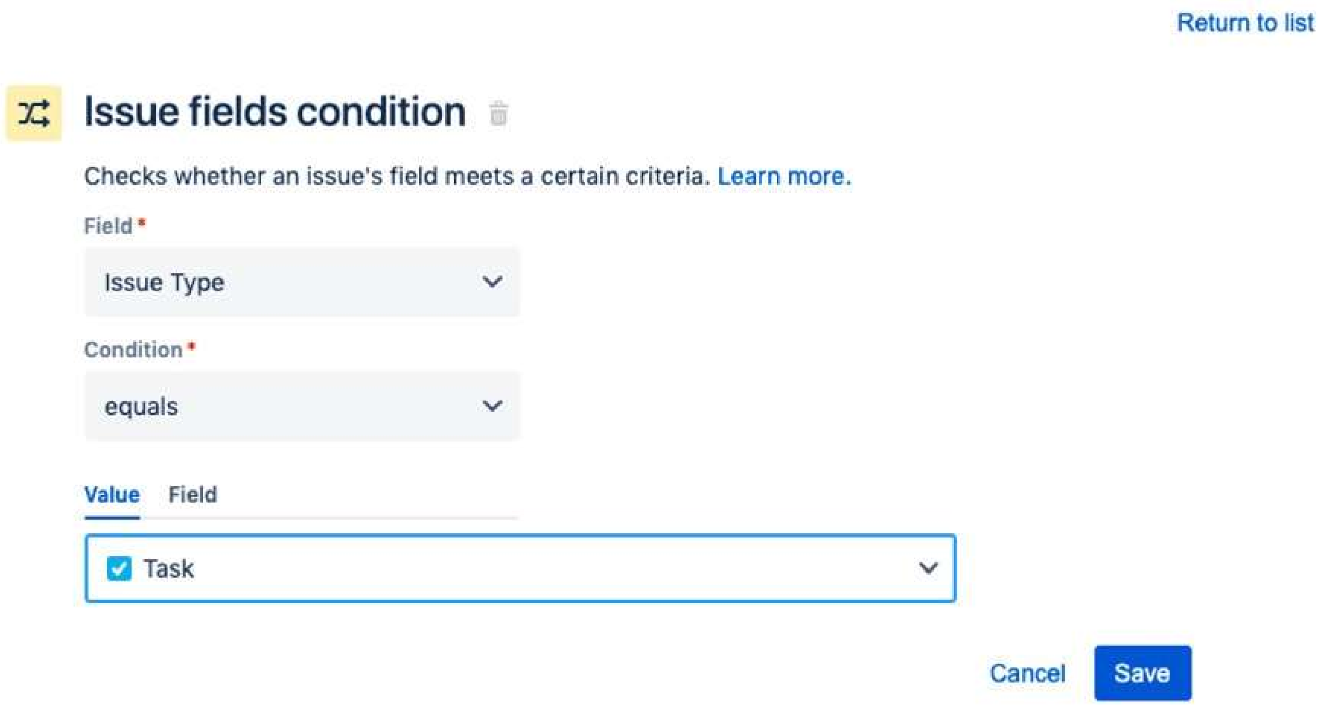
Since the goal of this tutorial is to create subtasks for issues, you must first click on the 'New Condition' option that appears on the 'Add Component' page.

Once you've done that, a new set of clickable options appear on your screen. Among them, click on the one that says 'Issue Fields Condition'.



Credit: Atlassian

At this point, the page redirects you to another window. This new page corresponds to the 'Issue Fields Configuration'. At this point, once again, you have some options at your disposal. From the drop-down, choose 'Issue Type' and switch the 'Value' that comes up to 'Task'. Then, hit the 'Save' button.



Credit: Atlassian

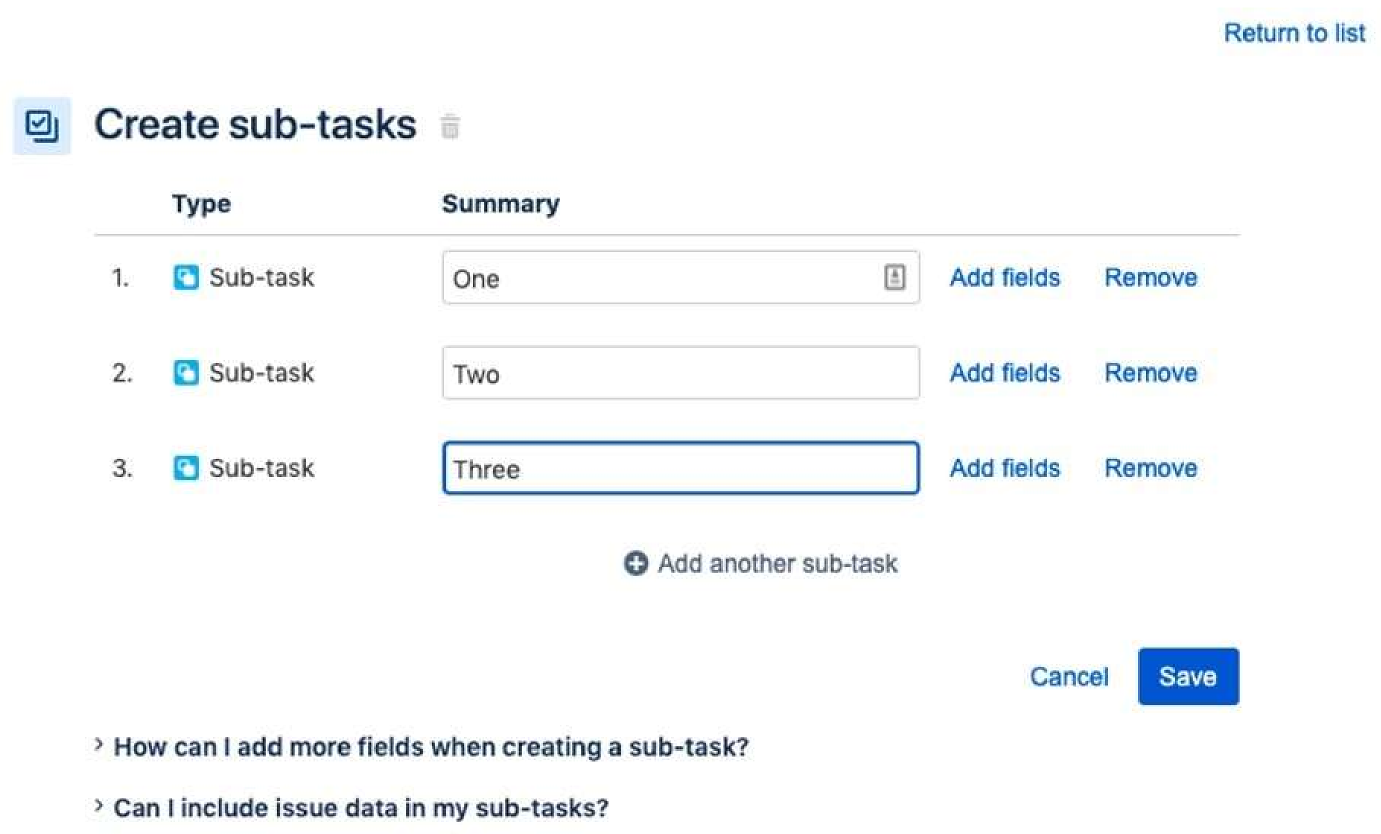
In the event that the condition you set is no longer possible, the system terminates the rule and discontinues carrying out any actions associated with that condition.

Step 3: Create a New Action

By this point, you have created both a new trigger and a new condition respectively. Now, you must create a new action. Triggers, new conditions, and actions form the pillars that make up Jira automation.

Actions are those functions that use the trigger and new condition you've set to carry out an action you've programmed. With actions, product managers automate tasks that allow you to change elements of your website.

Adding a new action is easy. To do so, the first thing you do is click on the 'New action Item' that pops up on the 'Add Component' page. With that done, you then filter based on the 'Create Sub-tasks' action that's available on the same page.



Credit: Atlassian

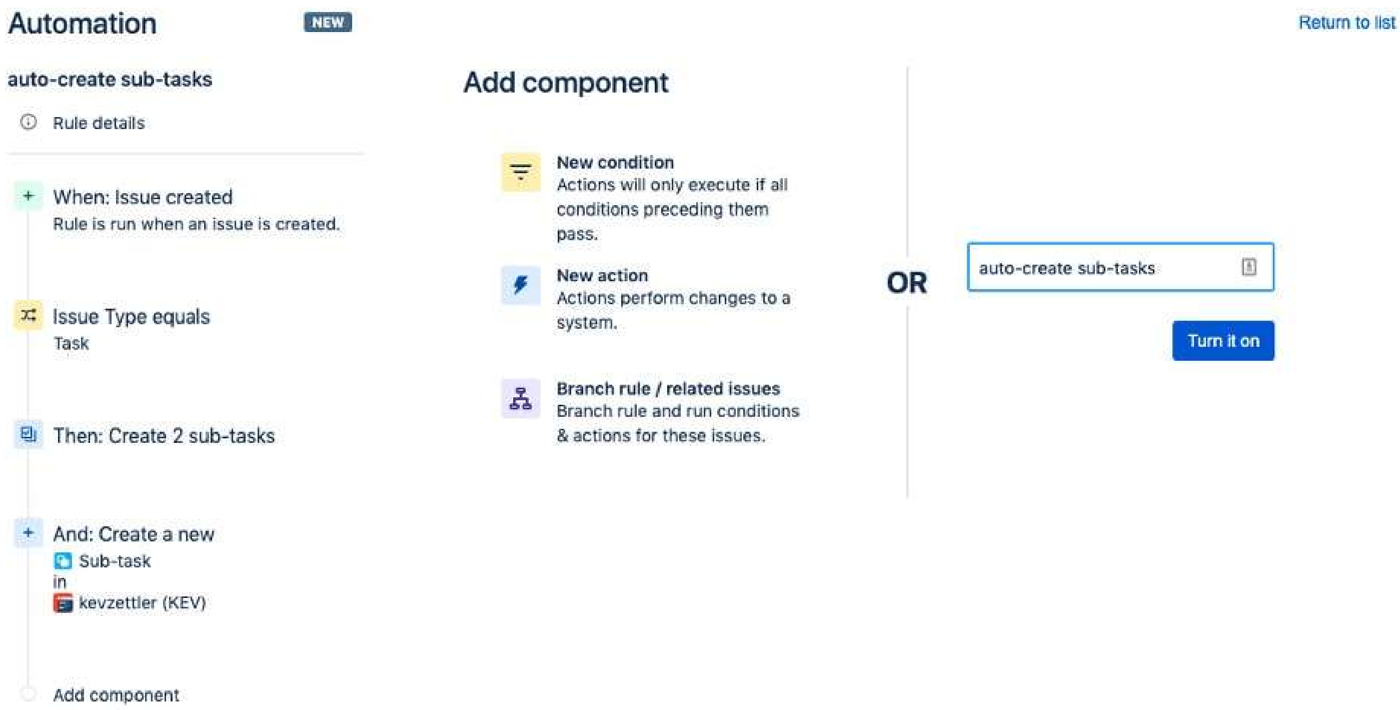
Once you've completed that, the next step is to go back to the 'Create sub-tasks page and add an additional subtask. To do so, find the option 'Add another subtask and then populate the 'Summary' fields as you see fit. Jira Software also gives you the option to modify each of the fields in the sub-tasks that you've created. However, this step is optional.

Once you have clicked 'Add fields' on the third sub-task, you automatically create the remaining two as a separate action.

At this point, the server takes you to a new screen labeled 'Create Issue'. There, you have the option to modify extra fields that pop up as you see best. Once you completed that, click the 'Save' button.

Step 4: Start the Jira Rule

By this point, you have already created the Jira rule and configured the subtasks that correspond to whatever issues you record in your project. Now, it's time to activate it.



Credit: Atlassian

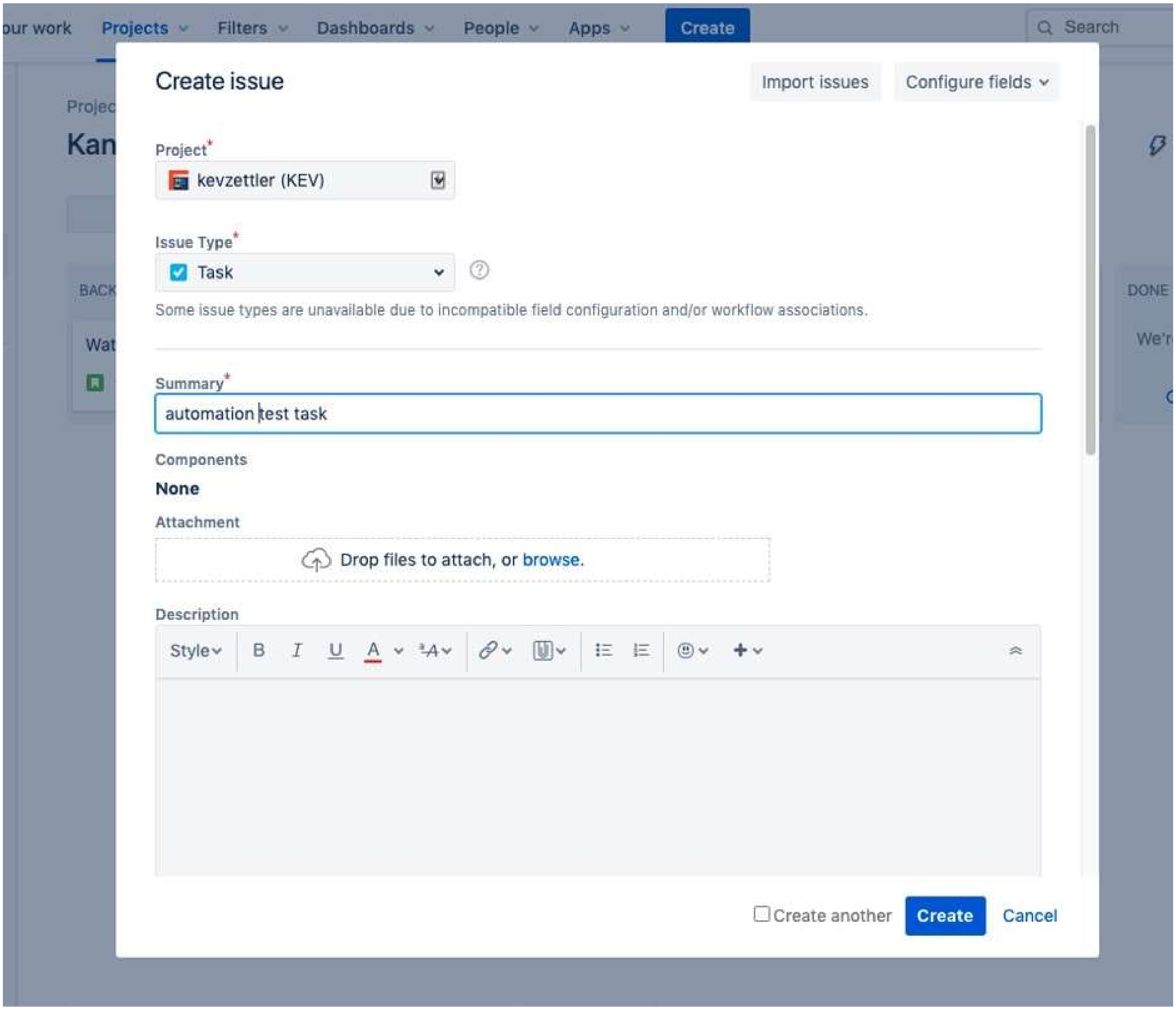
Since you clicked the ‘Save’, the server has redirected you to a new page that allows you to name your new automation. Once you have included a name, the time has come to initiate it.

This step is straightforward. To do so, click the ‘Turn it on’ button. Once you’ve done that, you’ve activated the rule.

Step 5: Test the Rule

Since your rule is now active, it’s time to test it out.

To do so, revisit your project, go to ‘New Issue’, and reconfigure the type to ‘Task’.



Credit: Atlassian

With that created, the automation rule activates behind the scenes. To confirm it works, visit the 'Audit Log'. Once you're there, toggle over to 'Project Settings' and then go to 'Automation'.

Once you're there, navigate through the list until you come across the automation rule you just created.

In the audit log, once you see a row under the column labeled 'Status' that the system marks as 'Success', that's proof that you successfully created the automation rule.

Conclusion

Rules are important tools in Jira software that product managers leverage to create subtasks for issues.

While Jira has several features, don’t allow the number of options you have at your disposal to overwhelm you.

Use this tutorial to get clarity on the steps you must take to flesh out subtasks for issues by way of Jira rules and save yourself and your team time during the project’s lifecycle.