JIRA

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1. JIRA – Overview

JIRA is an **Incident Management Tool** used for Project Management, Bug Tracking, Issue Tracking and Workflow. JIRA is based on the following three concepts – Project, Issue and Workflow.

Important Points to Note

The following points explain some interesting details of JIRA.

- JIRA is an incident management tool.
- JIRA is developed by **Atlassian Inc.**, an Australian Company.
- JIRA is a platform independent tool; it can be used with any OS.
- JIRA is multi-lingual tool – English, French, German, Japanese, Spanish, etc.
- JIRA supports MySQL, Oracle, PostgreSQL and SQL server in the backend.
- JIRA can be integrated with many other tools – Subversion, GIT, Clearcase, Team Foundation Software, Mercury, Concurrent Version System and many more.

License and Free Trial

The following points describes the legalities of the JIRA Tool.

- JIRA is a commercial tool and available as a Trial version for a limited time.
- To utilize JIRA services, a license is required.
- JIRA provides free license for academic projects.
- A 15-day trial version is available for an individual person to use.

Use of JIRA

Following are some of the most significant uses of JIRA.

- JIRA is used in Bugs, Issues and Change Request Tracking.
- JIRA can be used in Helpdesk, Support and Customer Services to create tickets and track the resolution and status of the created tickets.
- JIRA is useful in Project Management, Task Tracking and Requirement Management.
- JIRA is very useful in Workflow and Process management.

JIRA ─ Core Features

The following table explains some of the most important and commonly used features in detail for better understanding.

S. No.	Core Features	Description
1	**Boards**	JIRA supports Scrum and Kanban boards. These boards provide an immediate snapshot of the project to the team. Helps to quickly review the progress of the project and see the status of the individual tasks. Board workflow can be customized to fulfil the way a team wants to proceed.
2	**Business Project Template**	JIRA supports **n** number of business templates to manage simple tasks and complex tasks like workflow. Template can be customized based on the team and their approach. Ex: Workflow can be customized based on each team's approach. Every step is accounted and team can move to achieve their goals.
3	**Task Details**	Tasks can be defined at the individual level to track the progress. Status of every task, comment, attachment and due dates are stored in one place.
4	**Notifications**	An email can be sent for a particular task to the users. to Voting and watchi features the stakeholde keep an eye on the progress for Use **@mention** to get the attention of a specific team member at Comments/Description. User will instantly notify if something is assigned or if any feedback is required.

5	**Power Search**	JIRA supports a powerful search functionality with Basic, Quick and Advanced features. Use the search tool to find answers like due date, when a task was last updated, what items a team member still needs to finish. Project information at one place, search within a project.
6	**Reports**	JIRA supports more than a dozen reports to track progress over a specific timeframe, deadlines, individual's contribution, etc. Easy to understand and generate different reports those help to analyse how the team is going on. Easy to configure these reports and display the matrices to the stakeholders.
7	**Scale with Team Growth**	JIRA supports any business team and any project irrespective of size and complexity.
8	**Add -Ins**	JIRA supports more than 100 add-ins to connect with different software to make work easy. Wide range of add-ins makes it as universal across the globe.
9	**Multilingual**	JIRA supports more than 10 languages those are widely used as English (US, UK, India), French, German, Portuguese, Spanish, Korean, Japanese and Russian.
10	**Mobile App**	JIRA is available as a Mobile Application as well. It is available on Google Play Store and App Store (iTunes) of Apple. Easy to stay connected with the team while moving anywhere with notification, comments and project activity.

A Project contains issues; a JIRA project can be called as a collection of issues. A JIRA Project can be of several types. For example –

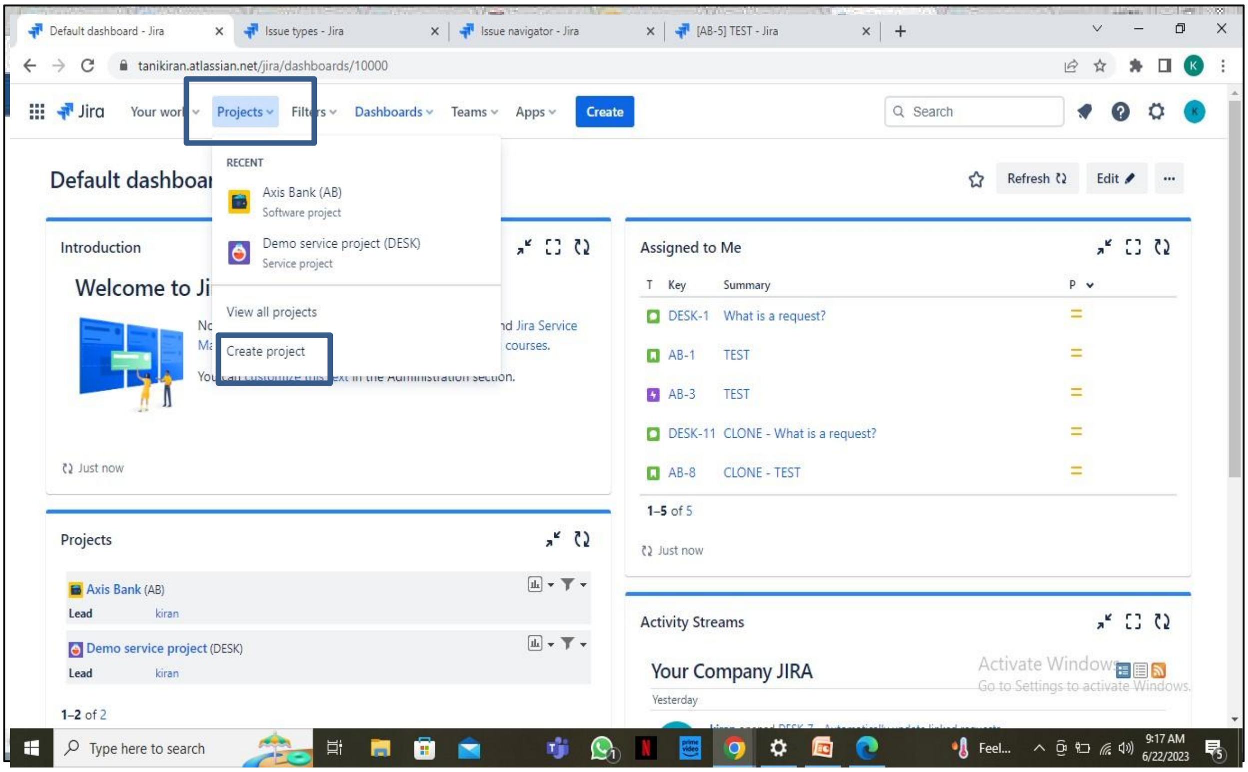
- Software Development Project
- Marketing Project

- Migration to other platform project
- Help Desk Tracking Project
- Leave Request Management System
- Employee Performance System
- Website Enhancement

Create a New Project

To create a project, the user should login as a JIRA Service Desk Admin and then Click on Project → Create Project.

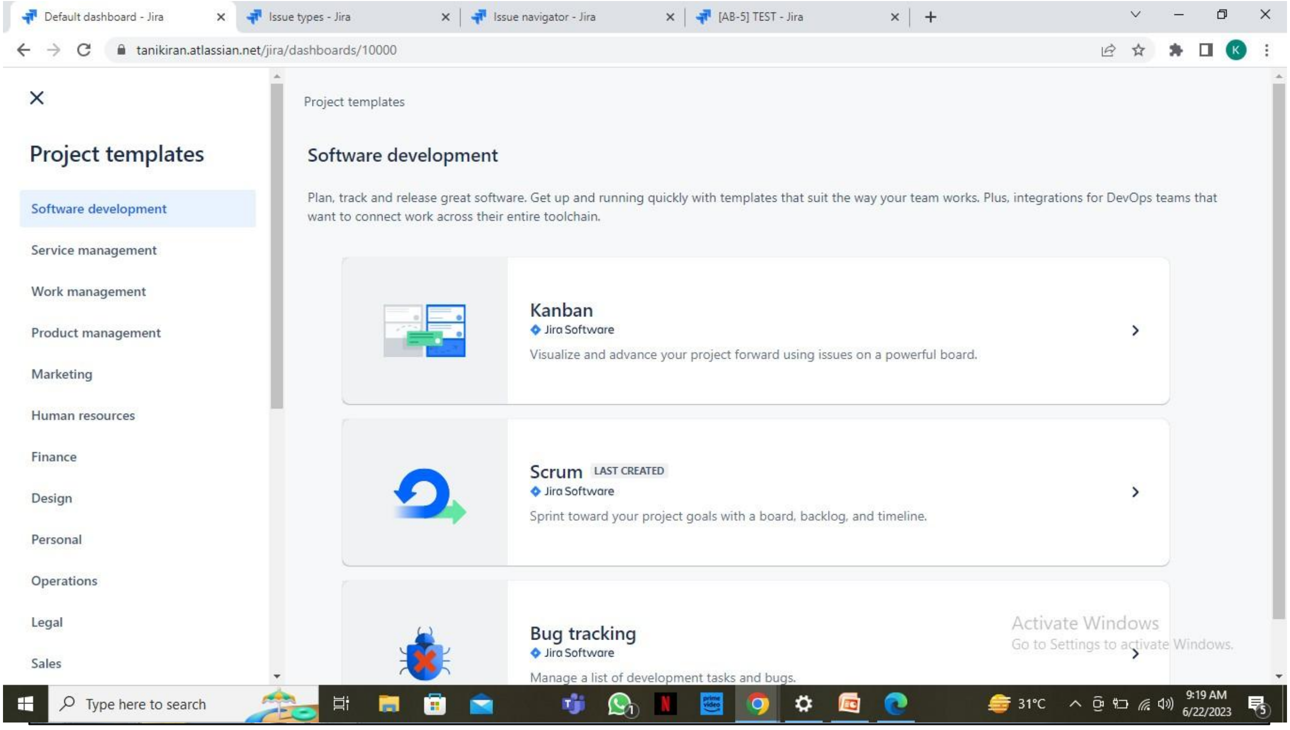
The following screenshot shows how to reach to the **Create Project** button from the Dashboard.



Choose the type of Project that suits your requirement and the process it should follow.

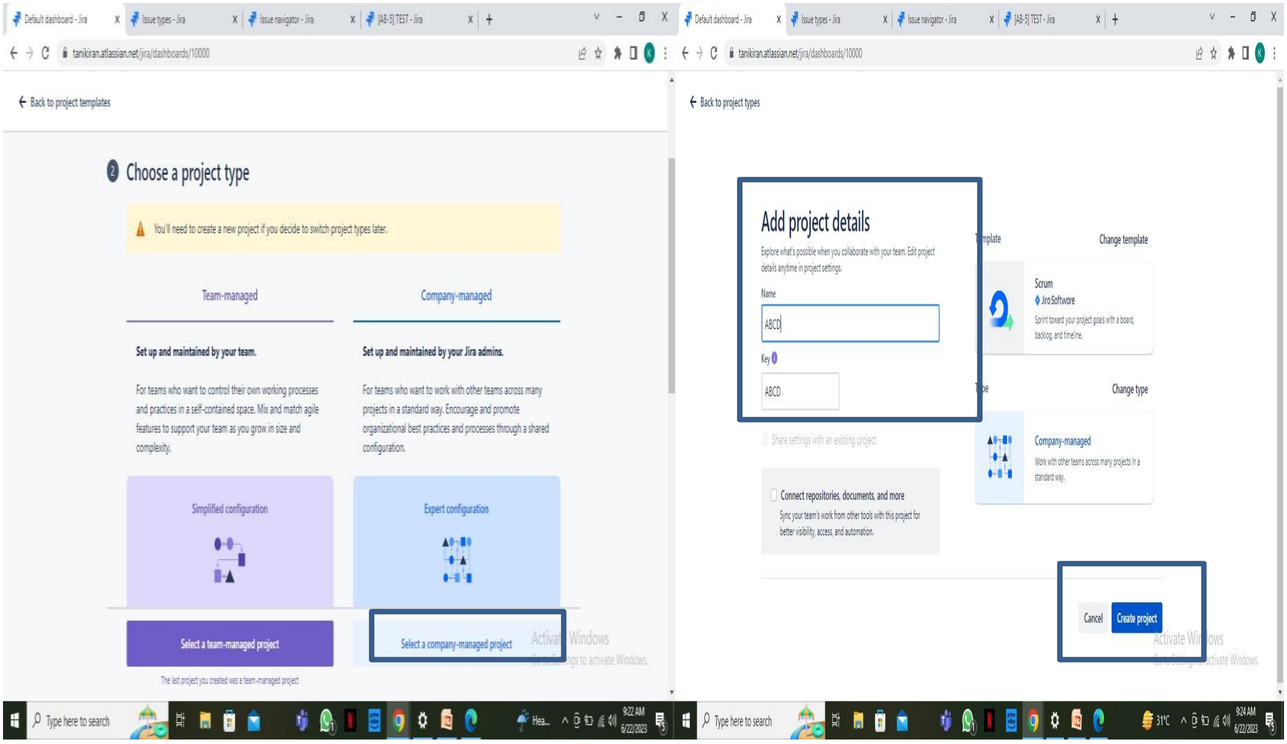
JIRA

The following screenshot displays the type of projects available in JIRA.



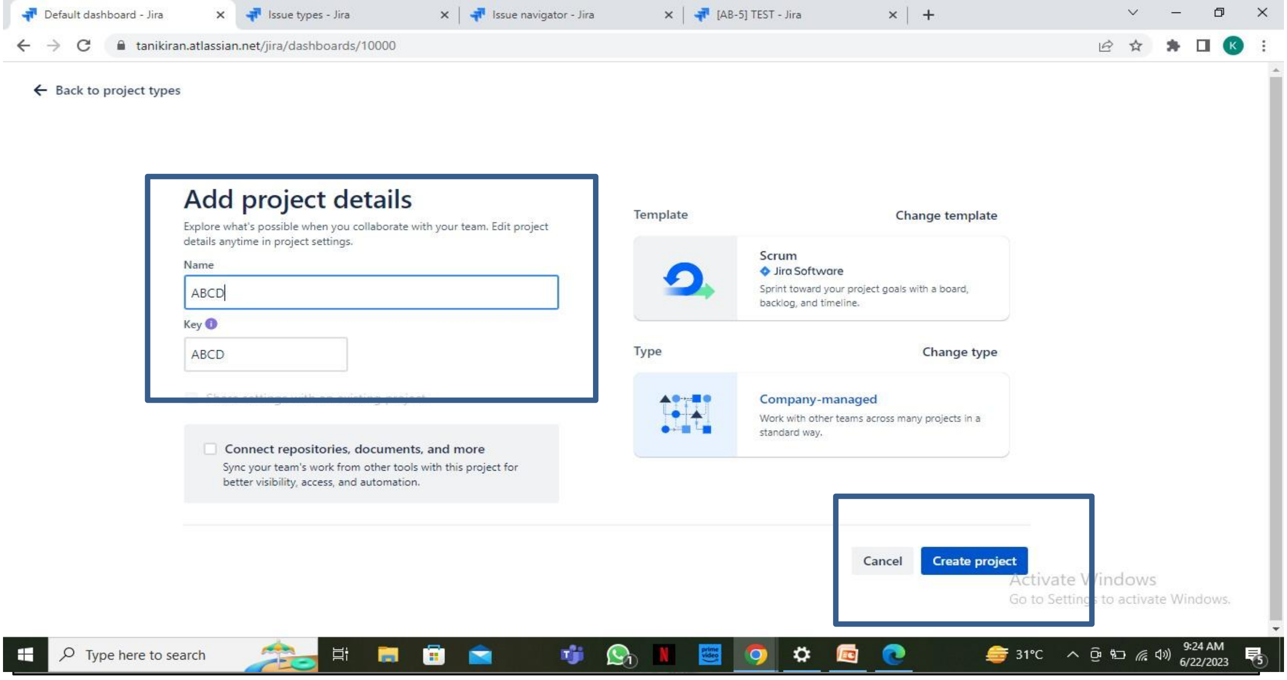
Once the type of project is selected, click on Next. The user will see the Project Type. Then need to Provide the Project name and Key & then Click Create A Project will create.

The following screenshot displays the steps mentioned above:



Click on the Select button, enter the name of the project and confirm the Key that the user wants to display as a reference in all the issues. Once this is done, click on the Submit button.

The following screenshot displays the fields to provide details before the creation of a project.



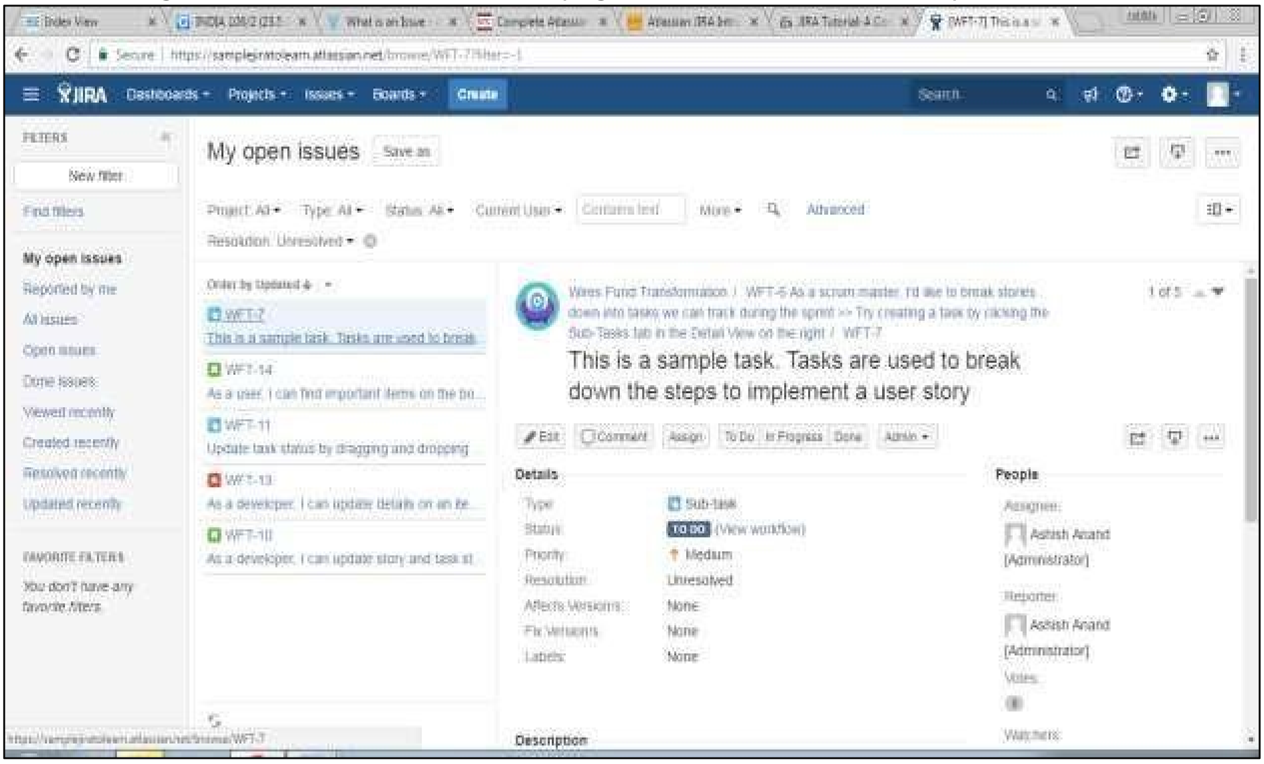
3. JIRA – Issues

JIRA is a project management tool and uses issues to track all the tasks. An issue helps to track all works that underlie in a project. In real time, every work or task either technical, non-technical, support or any other type of a project in JIRA are logged as an issue.

An issue can be dependent on the organization and requirements:

- Story of a project
- Task of a story
- Sub-task of a story
- A defect or bug can be an issue
- Helpdesk Ticket can be logged as issue
- Leave Request

The following screenshot shows the basic page and information of an open issue.



4. JIRA – Workflow

In JIRA, workflow is used to **track the lifecycle of an Issue**. Workflow is a record of statuses and transitions of an issue during its lifecycle. A status represents the stage of an issue at a particular point. An issue can be in only one status at a given point of time like Opened, To Do, Done, Closed, Assigned, etc.

A transition is a link between two statuses when an issue moves from one status to another. For an issue to move between two statuses, a transition must exist. In a simple way, a transition is some kind of work done on the issue, while status is the impact of work on that issue.

Example

As of now, an issue is created and opened. When the assignee starts working on the issue, the issue moves to the **In Progress status**. Here, the transition is starting the work, while the status of the issue is now progressive.

JIRA workflow has the following stages to track as soon as an issue is created:

- **Open Issue:** After creation, the issue is open and can be assigned to the assignee to start working on it.

- **In Progress Issue:** The assignee has actively started to work on the issue.

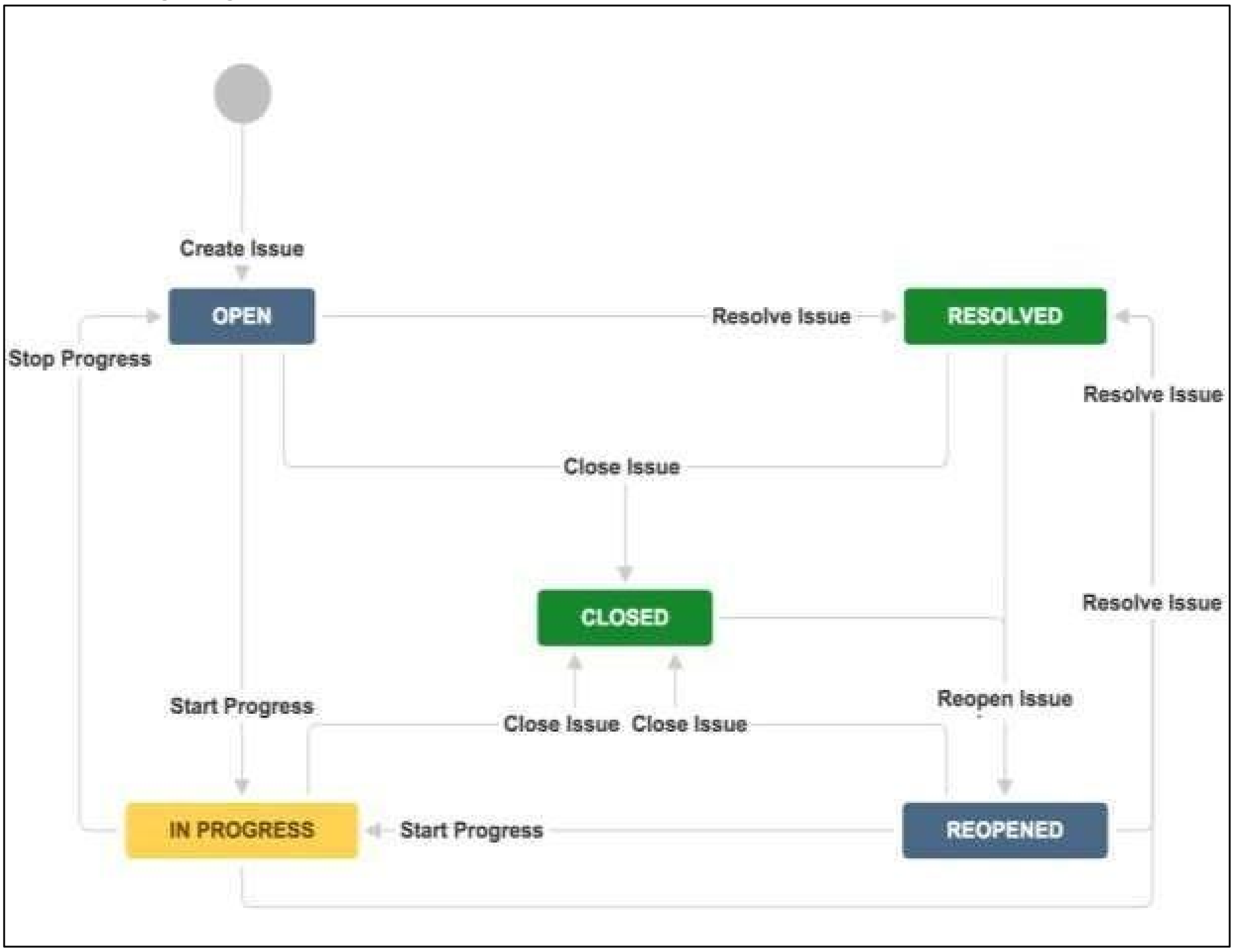
- **Resolved Issue:** All sub-tasks and works of that Issue are completed. Now, the issue is waiting to be verified by the reporter. If verification is successful, it will be closed or re-opened, if any further changes are required.

- **Reopened Issue**: This issue was resolved previously, but the resolution was either incorrect or missed a few things or some modifications are required. From Reopened stage, issues are marked either as assigned or resolved.

- **Close Issue:** The issue is considered as finished, resolution is correct as of now. Closed issues can be re-opened later based on the requirement.

JIRA Workflow can be referred as a **Defect Lifecycle**. It follows the same concepts; the only difference is that it is generic for all issues rather than limited to Defects only.

The following diagram shows a standard workflow:



A transition is a one-way link, if an issue moves back and forth between two statuses; two transitions should be created.

Example: There are two-way transitions between closed and re-opened statuses. A closed issue can be reopened if any modifications are required at any time until the project completes, while a re-opened issue can be closed directly if additional work is taken care in another issue and no specific work has been done on the re-opened issue.
In this chapter, we will learn how to install JIRA on your system.

Important Points to Note

- JIRA is a web application that provides a private website to an individual or a set of requested users belonging to the same company/project.
- JIRA can be run as a Windows Service at the server side.
- JIRA is a pure Java based application and supports all OS platforms like Windows, Linux of different versions or MAC, etc., those satisfy JDK/JRE requirements.
- JIRA supports all famous browsers like Chrome, IE, Mozilla and Safari.
- It supports Mobile browsers as well in mobile views.

5. JIRA – Installation

System Requirements

Since JIRA is a web-application, it follows the concept of client/server. It means that JIRA can be installed centrally on a server and users can interact with it through web-browsers using a website from any computer.

- **Browser:** JavaScript should be enabled, the user is recommended not to use any script-blocking tool like **NoScript** to access full functionality of JIRA.

- **JDK/JRE:** It is recommended to update JRE/JDK with the latest version. JIRA 6.4 recommends using JRE/JDK version 8.

Since our scope is to consume the JIRA application as end users, we can ignore the server side requirements.

Installation at the Server Side

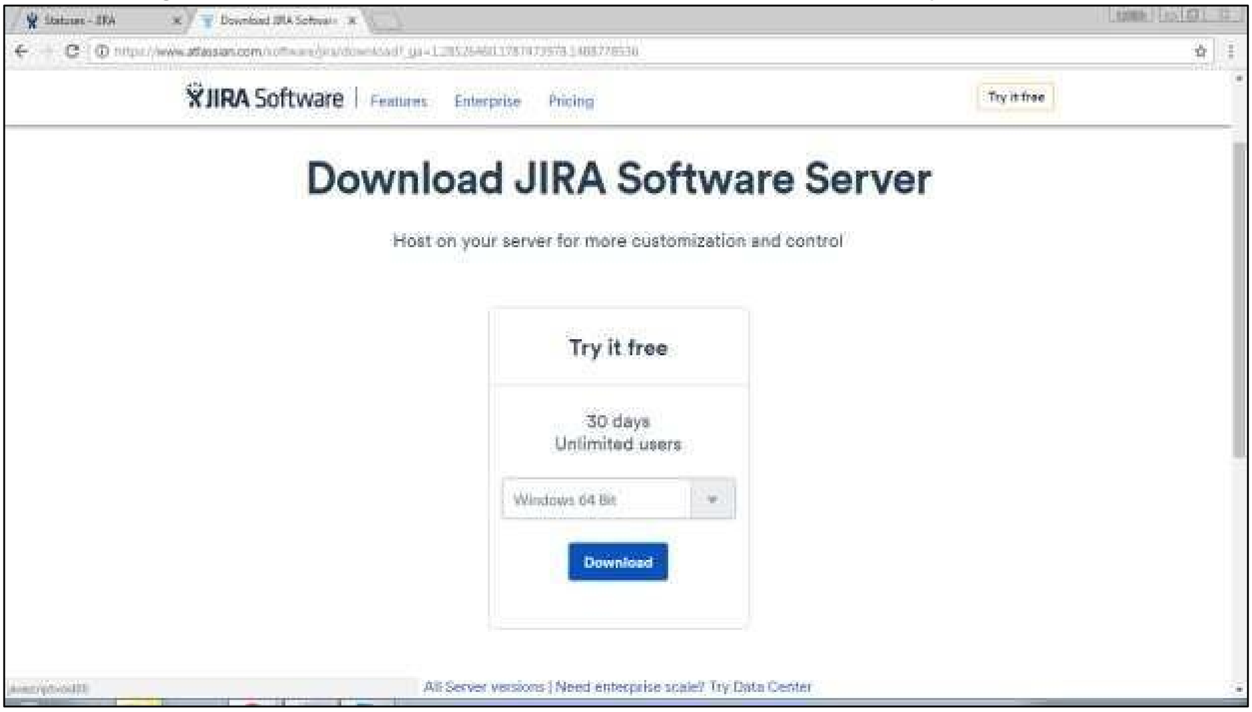
- JIRA follows the Client/Server concept. At the server side, JIRA must be installed before using it as end user.

- At the server side, JIRA must connect with relation database to store issues/application data.

- Download the JIRA **Windows Installer.exe** file from the following link – https://www.atlassian.com/software/jira/download?_ga=1.28526460.1787473978.1488778536

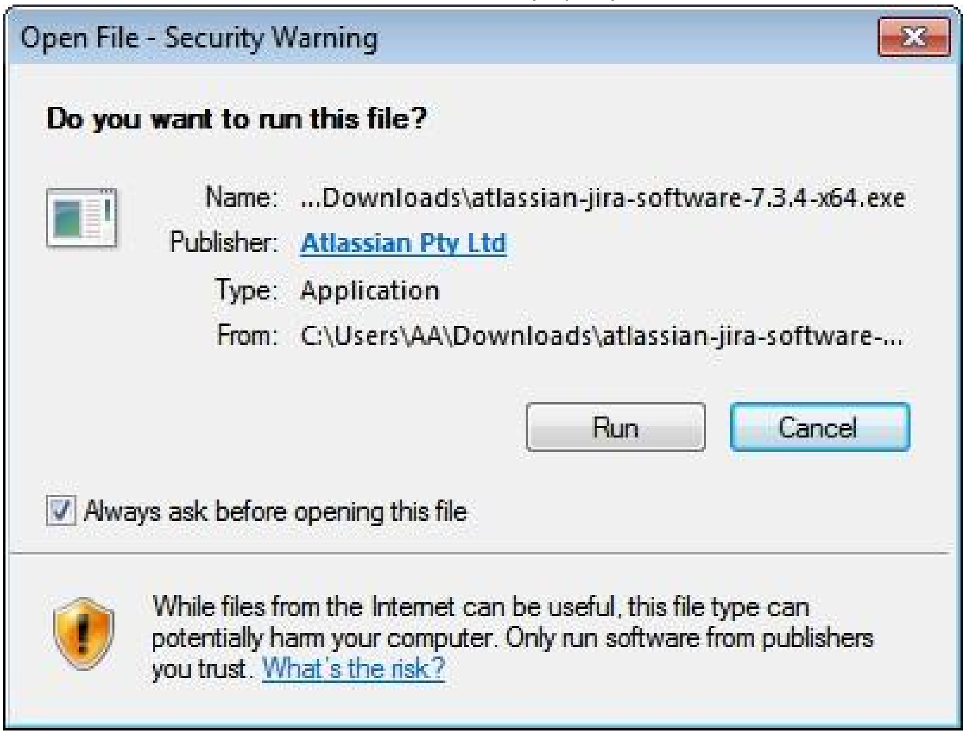
- Select the OS type and click on Download

The following screenshot shows how to download the **.exe** file for a specific OS.



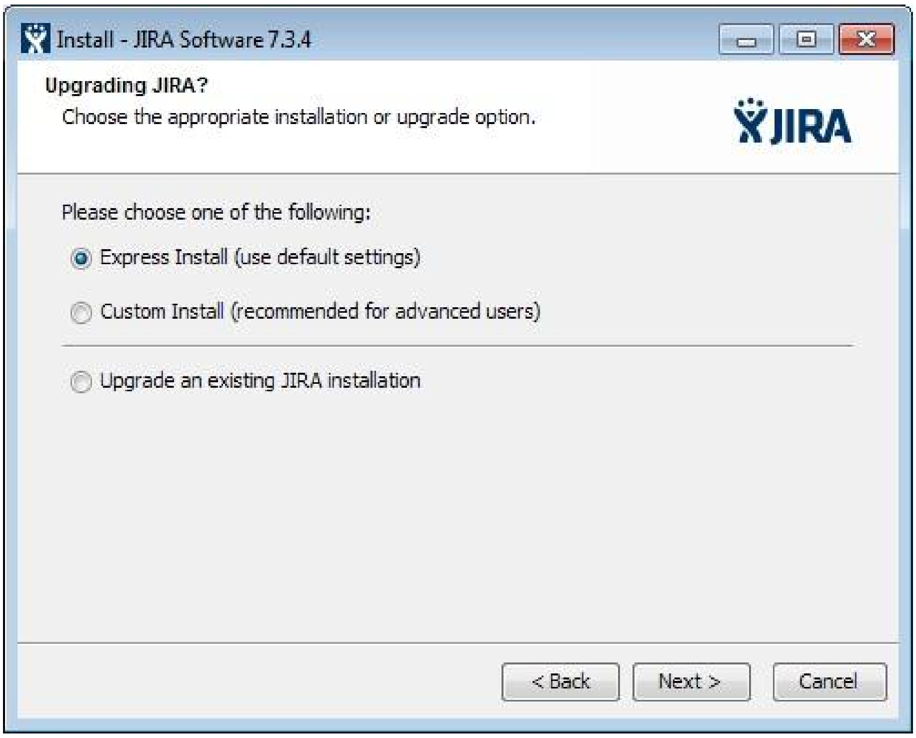
Run the .exe file to run the installation wizard. The following screenshot shows the downloaded .exe file.

After clicking the .exe file, the **Run** confirmation pop-up displays, click on RUN. The following screenshot shows the RUN confirmation pop-up.

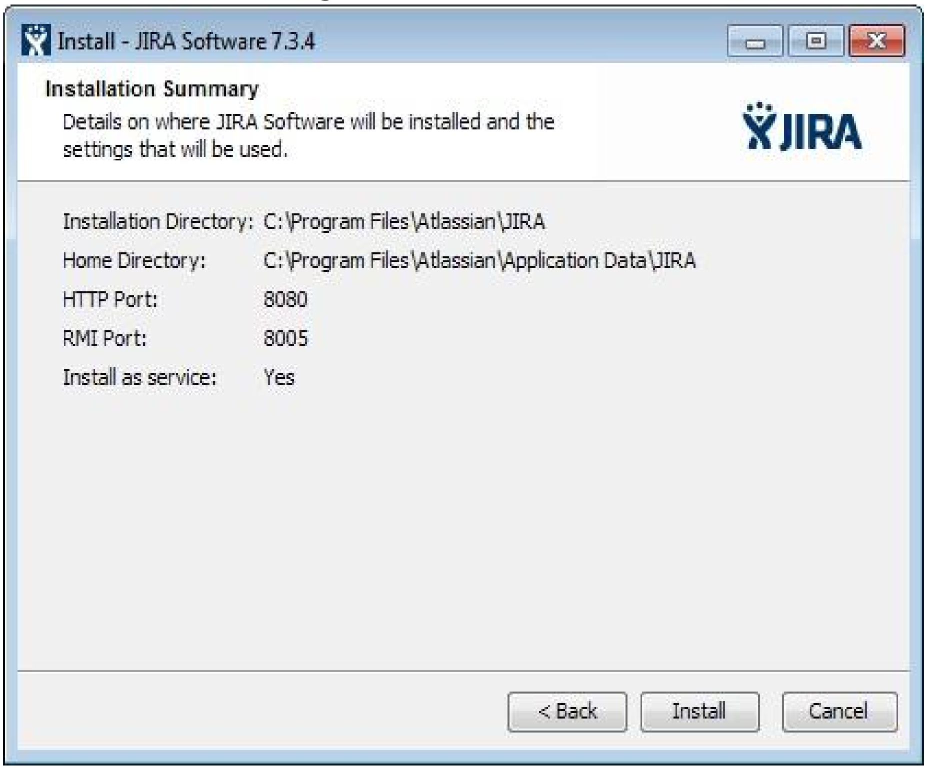


The following JIRA installation wizard displays, click on Next.

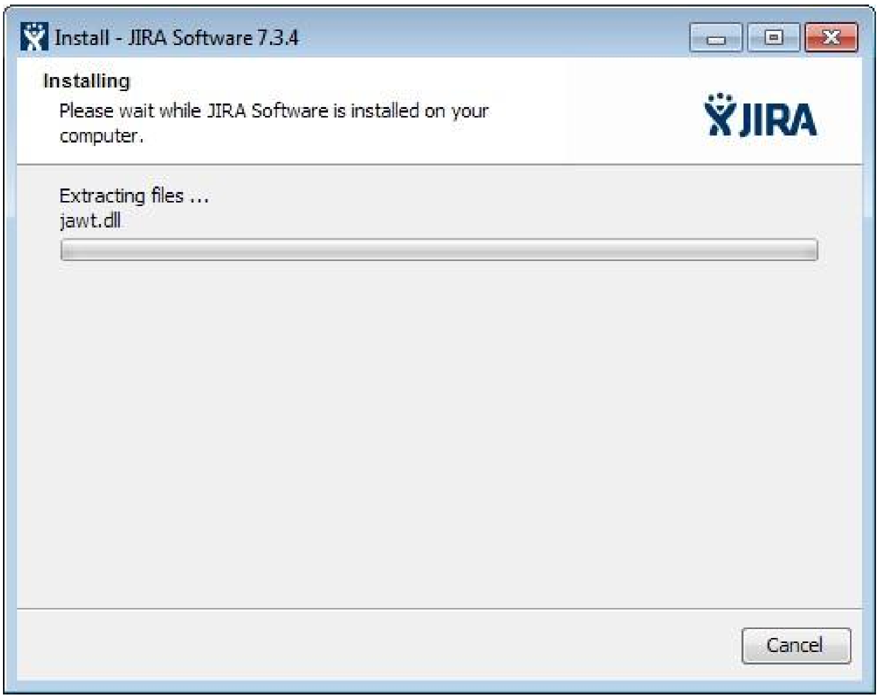
Choose the appropriate installation option as shown in following screenshot and then click on Next.



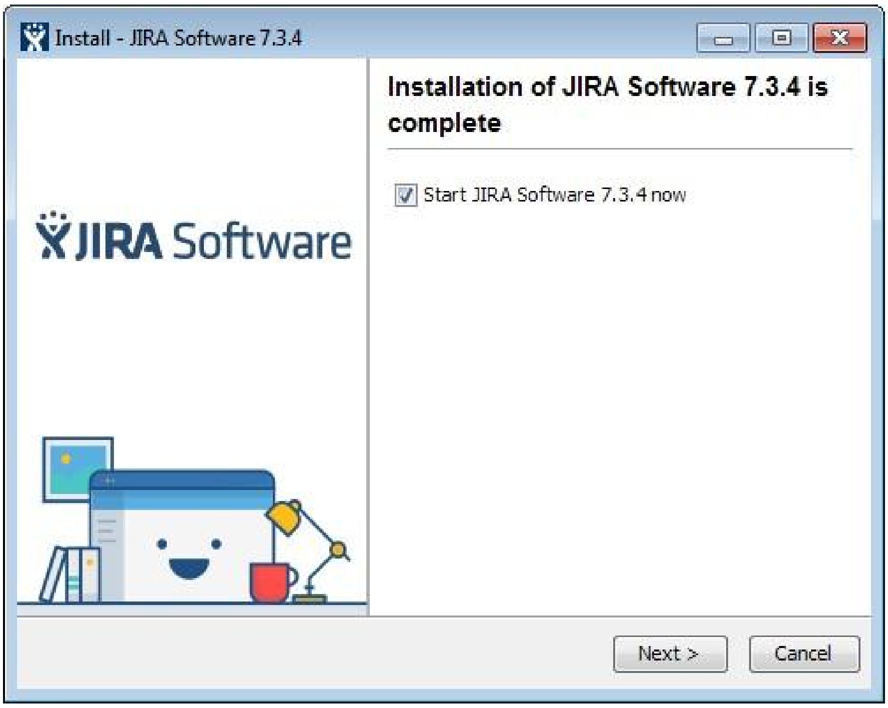
The installation summary is displayed with the Destination Directory, Home Directory, TCP Ports, etc., as shown in the following screenshot.



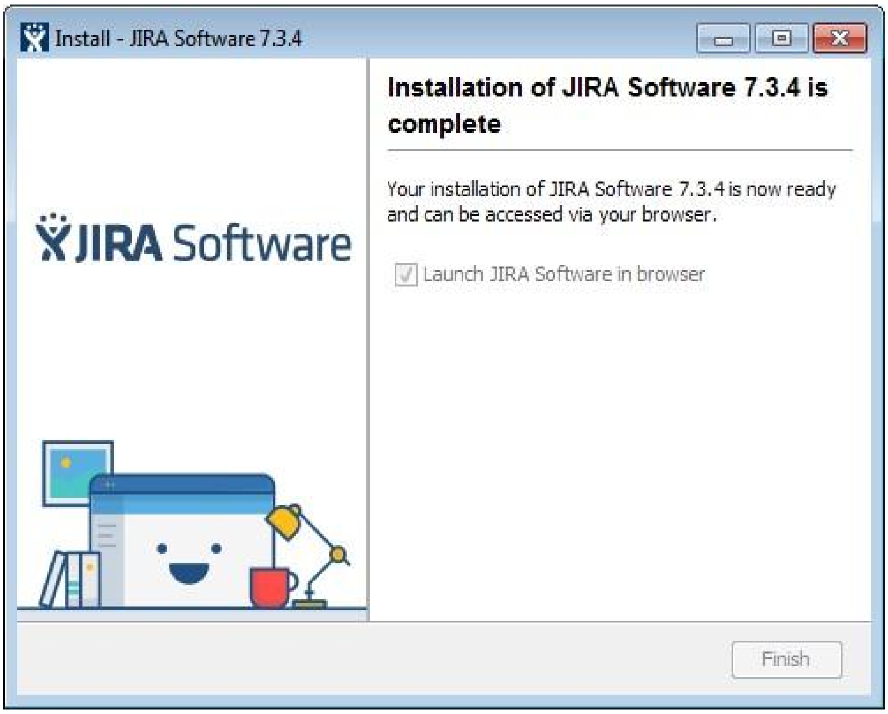
Click on Install. JIRA will start installing as displayed in following screenshot. It takes a couple of minutes to finish the installation.



After installation, JIRA will be started automatically if the check box to "Start JIRA Software 7.3.4 now" is checked. Then click on Next, if not, it can be accessed using the appropriate Windows Start Menu shortcut.



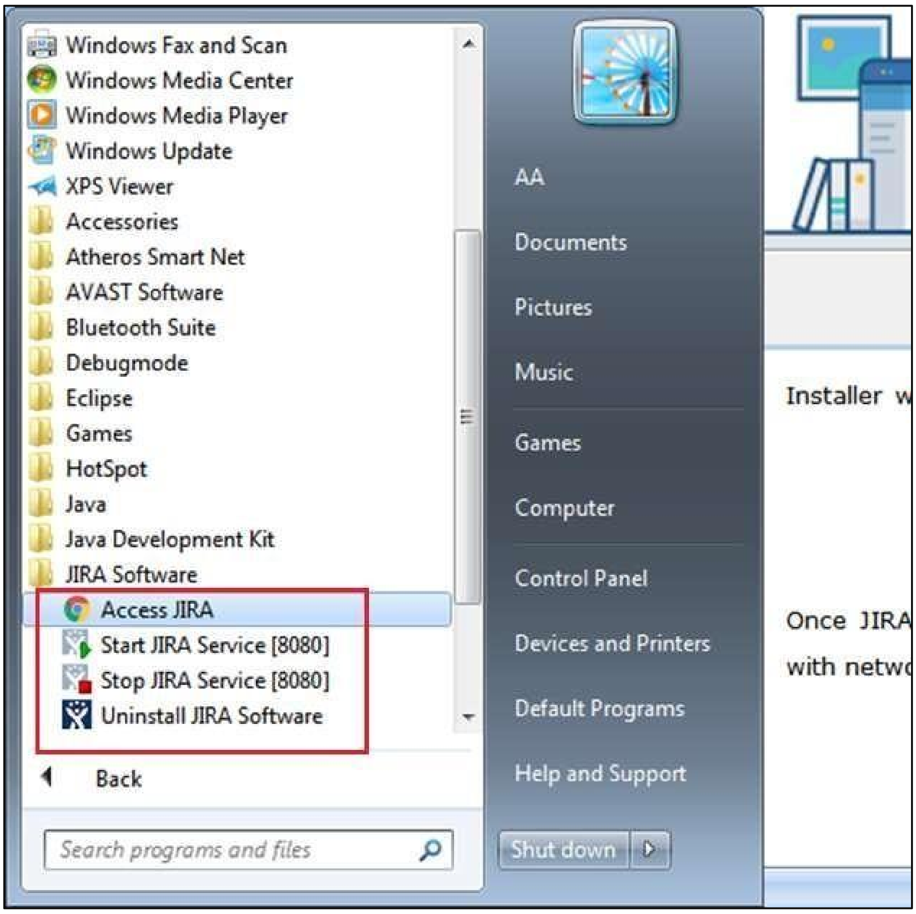
Click the Finish button.



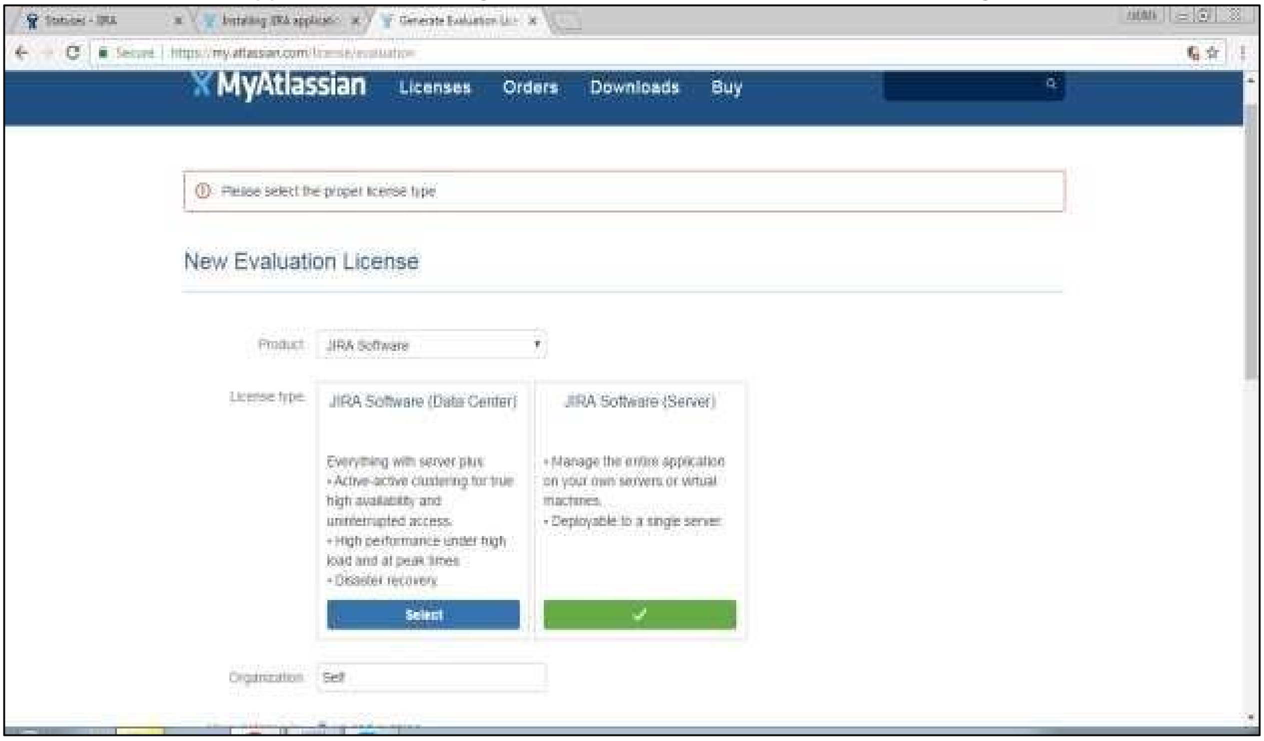
The installer will create the following shortcuts on the start menu:

- Access JIRA
- Start JIRA Server
- Stop JIRA server
- Uninstall JIRA

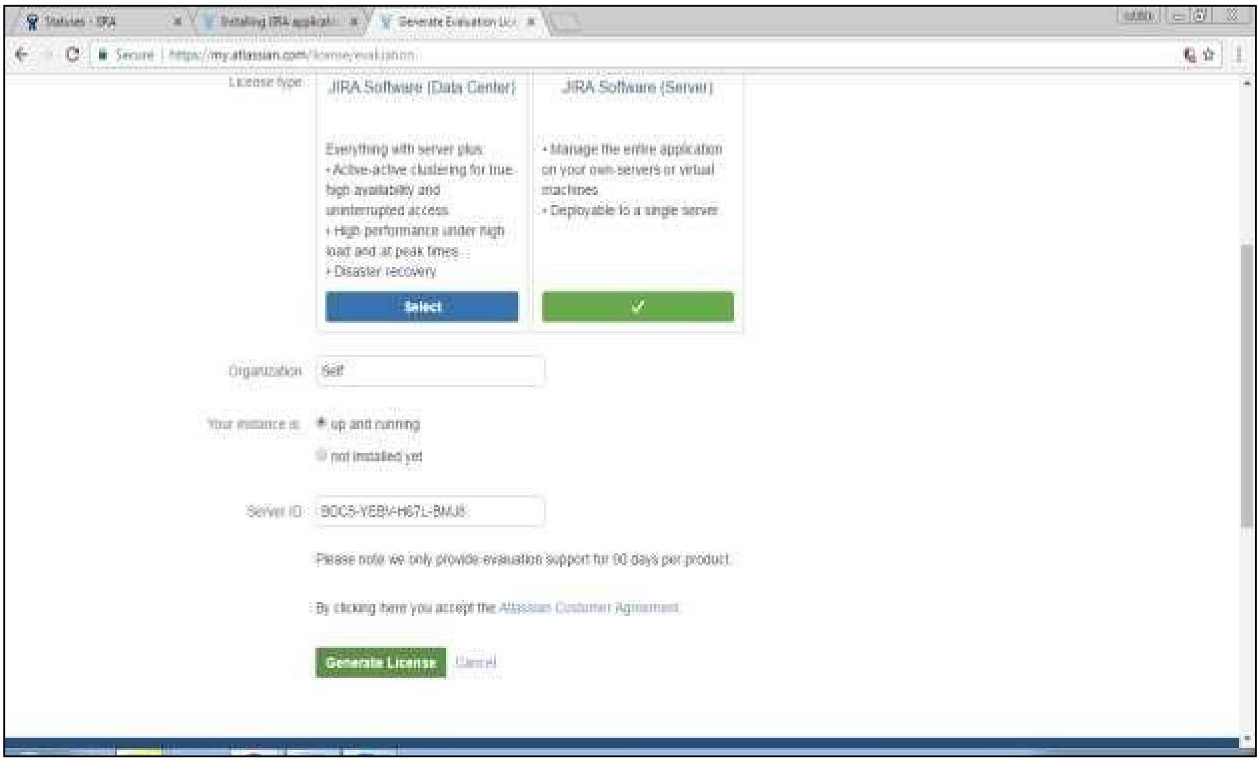
The following screenshot shows the above-mentioned shortcuts:



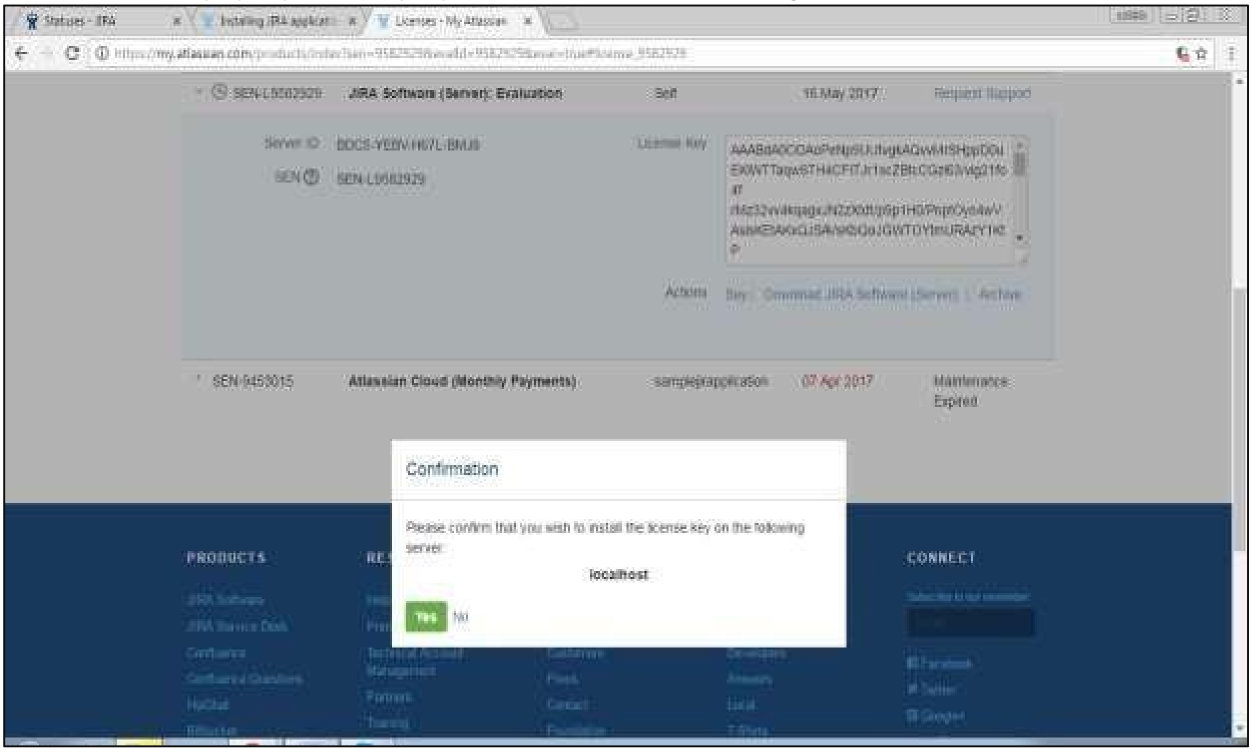
Select the license type and enter organization name as shown in following screenshot:



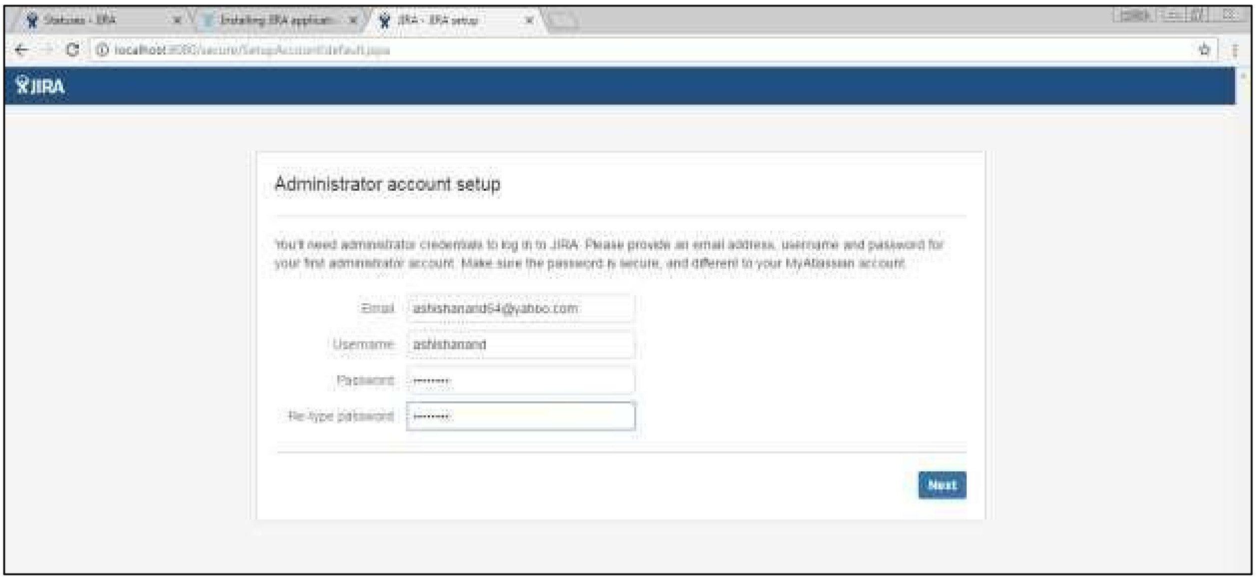
Click on Generate License



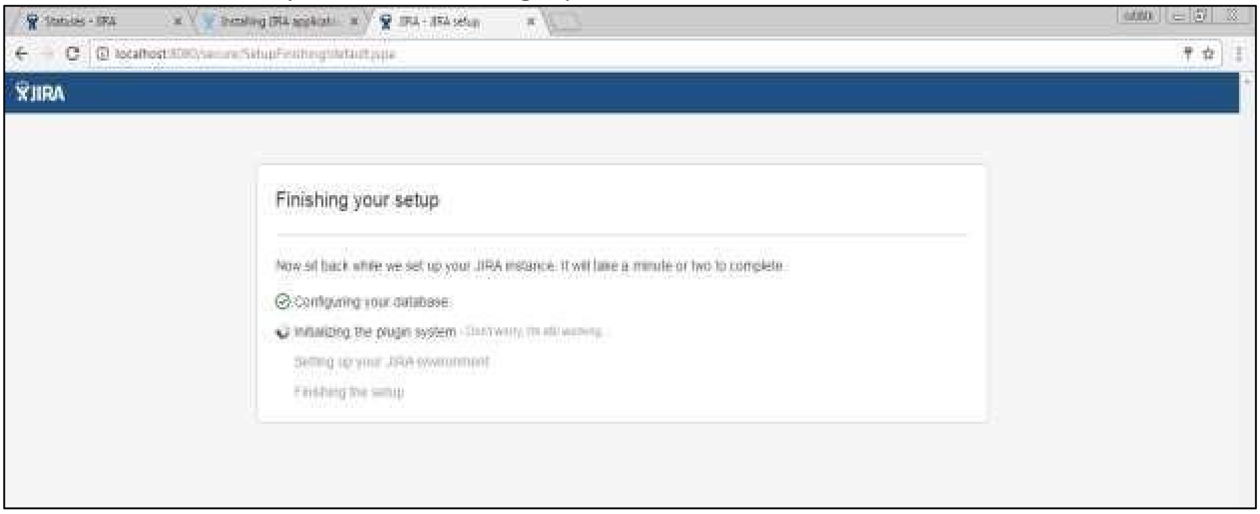
A confirmation pop-up will display as shown in the following screenshot. Click on Yes.



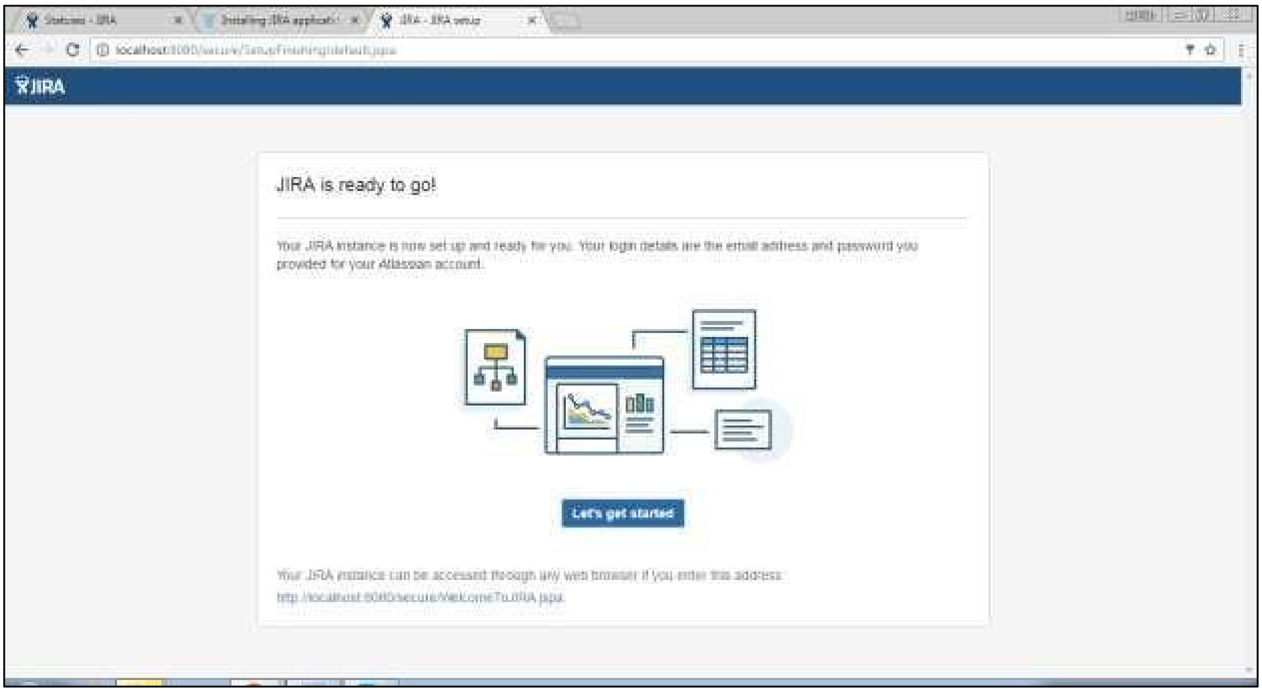
Set up the administration account as displayed in the following screenshot.



JIRA will automatically finish the setting-up as shown below:



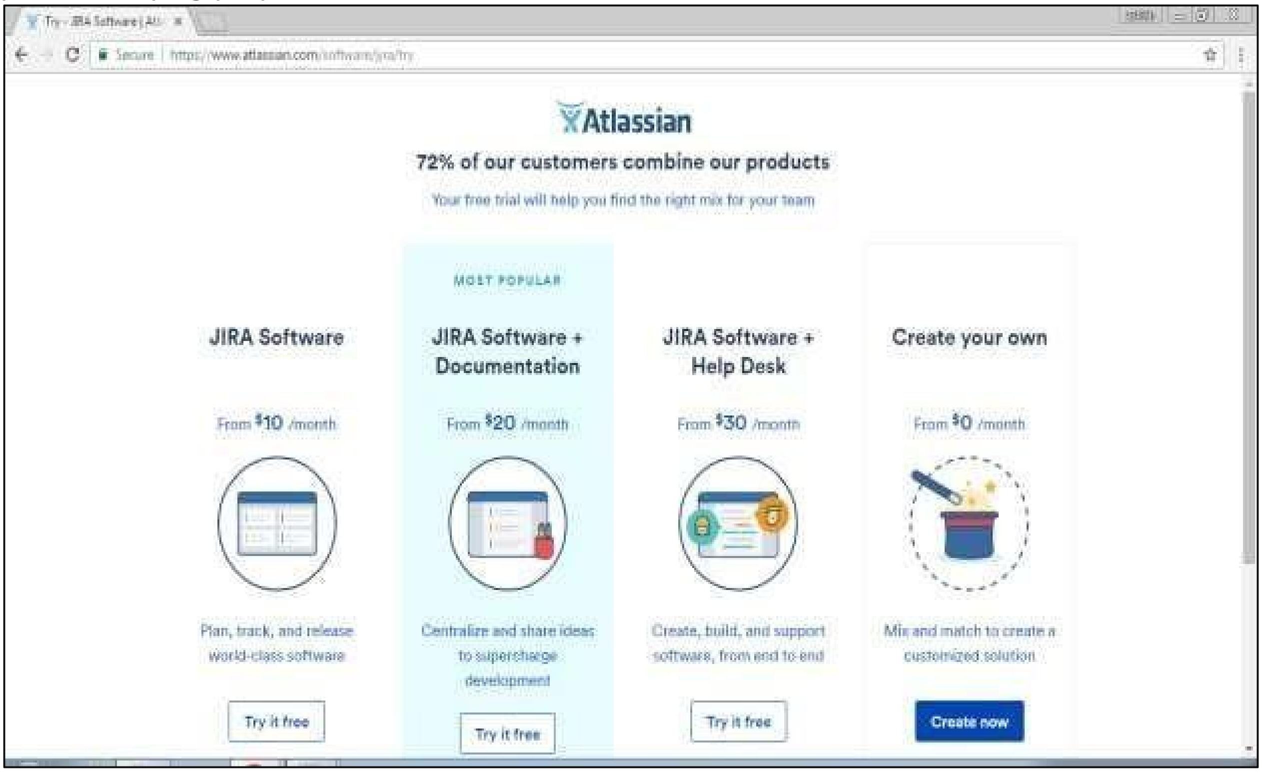
Once JIRA finishes the setup and starts running in the server, the user can access it from a browser on any computer with network access to the JIRA server.


JIRA
JIRA is ready to go!
Your JIRA instance is now set up and ready for you. Your login details are the email address and password you provided for your Atlassian account.
Let's get started
Your JIRA instance can be accessed through any web browser if you enter this address:
http://localhost:8080/secure/WelcomeToJIRA.jspa

6. JIRA – Free Trials Setup

JIRA provides 15 days to 1-month free trials of basic features. JIRA has other plans as well with different advanced features and add-ins. The cost depends on the number of users.

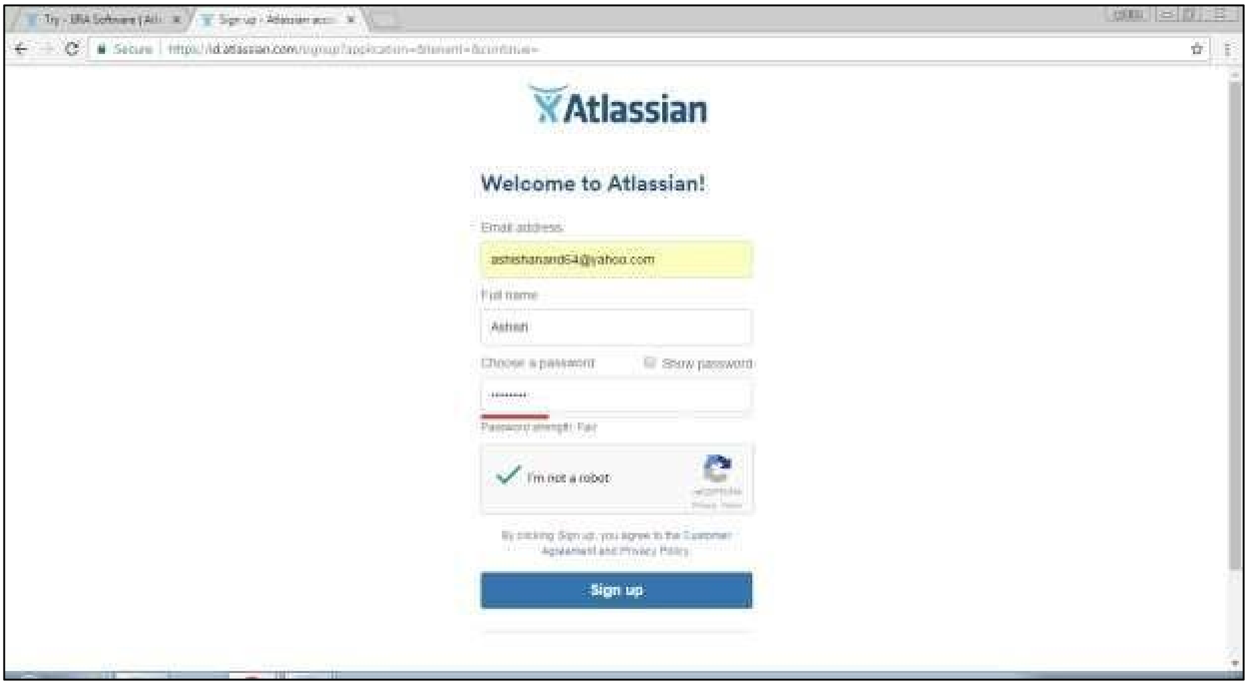
By visiting https://www.atlassian.com/software/jira/try, a user can see different available plans for trying purposes.



Setup for Free Trials

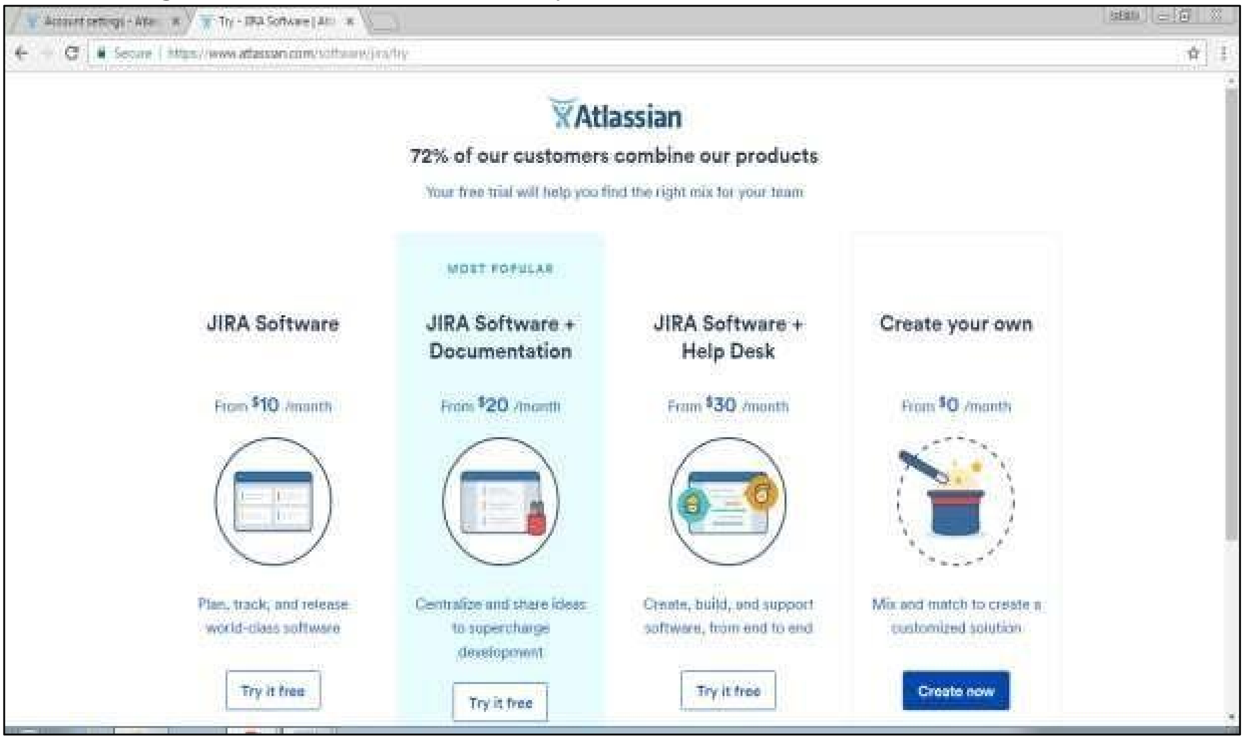
To setup a free trial, the user has to Sign up on the following link – https://id.atlassian.com/signup?application=&tenant=&continue or login if he already has an account.

The following screenshot shows required fields to sign up in Atlassian account.



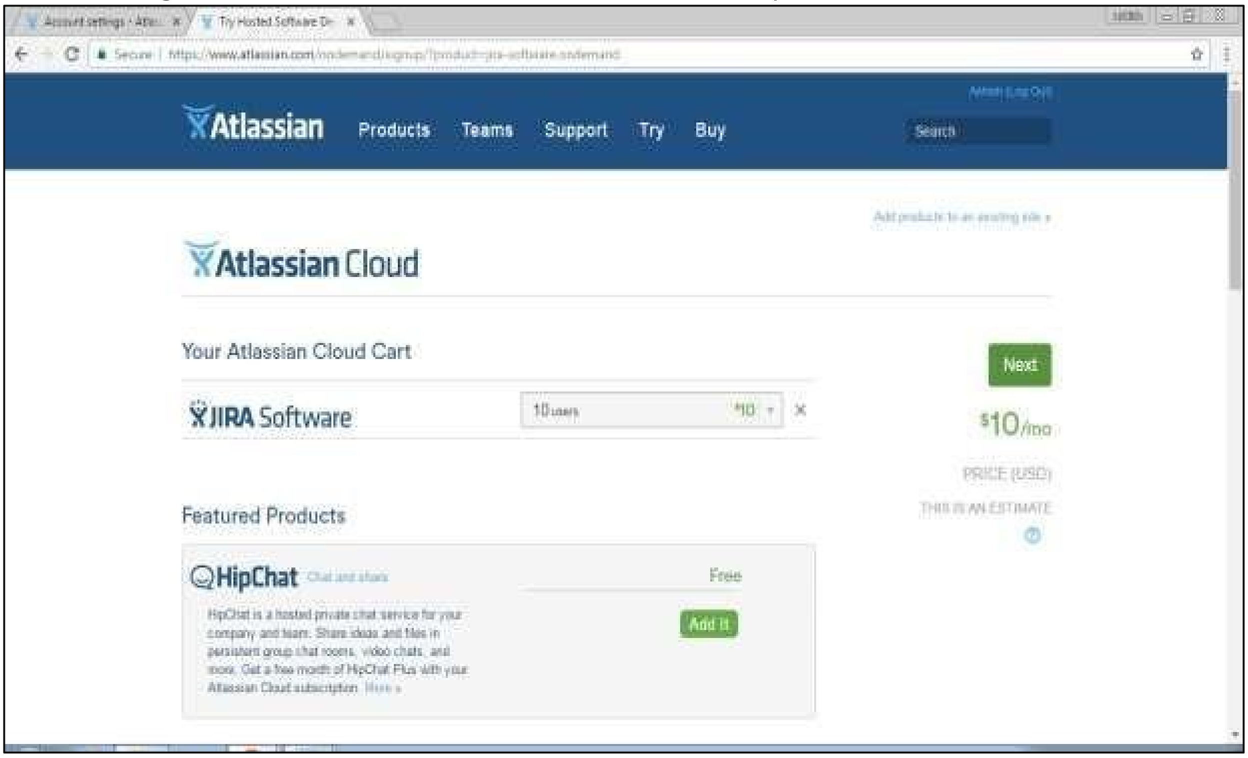
The user has to log into the email account and verifies the account by clicking on the link sent by JIRA-Atlassian. The next step is to go to https://www.atlassian.com/software/jira/try and click on **Create now** button, which is at the bottom right hand of the webpage.

The following screenshot shows different plans available for trial of JIRA.

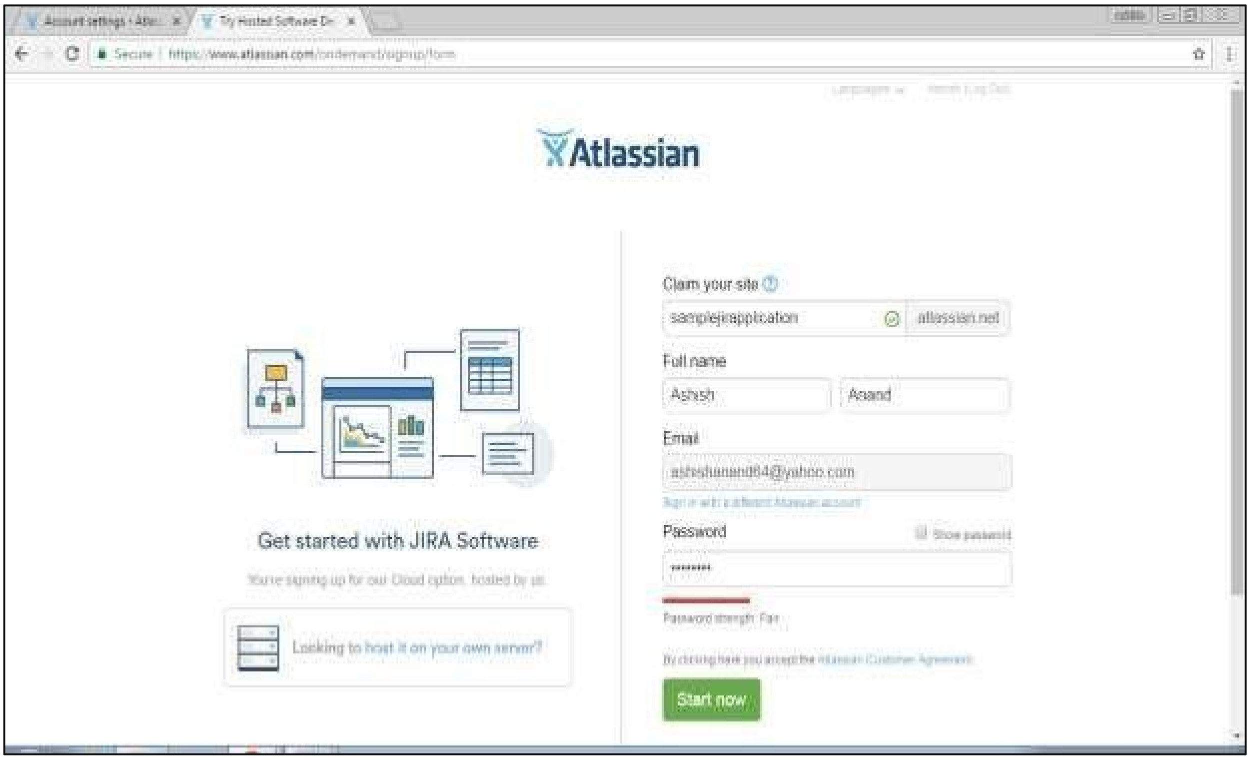


JIRA

The following screenshot shows the details of the chosen plan for a free trial.



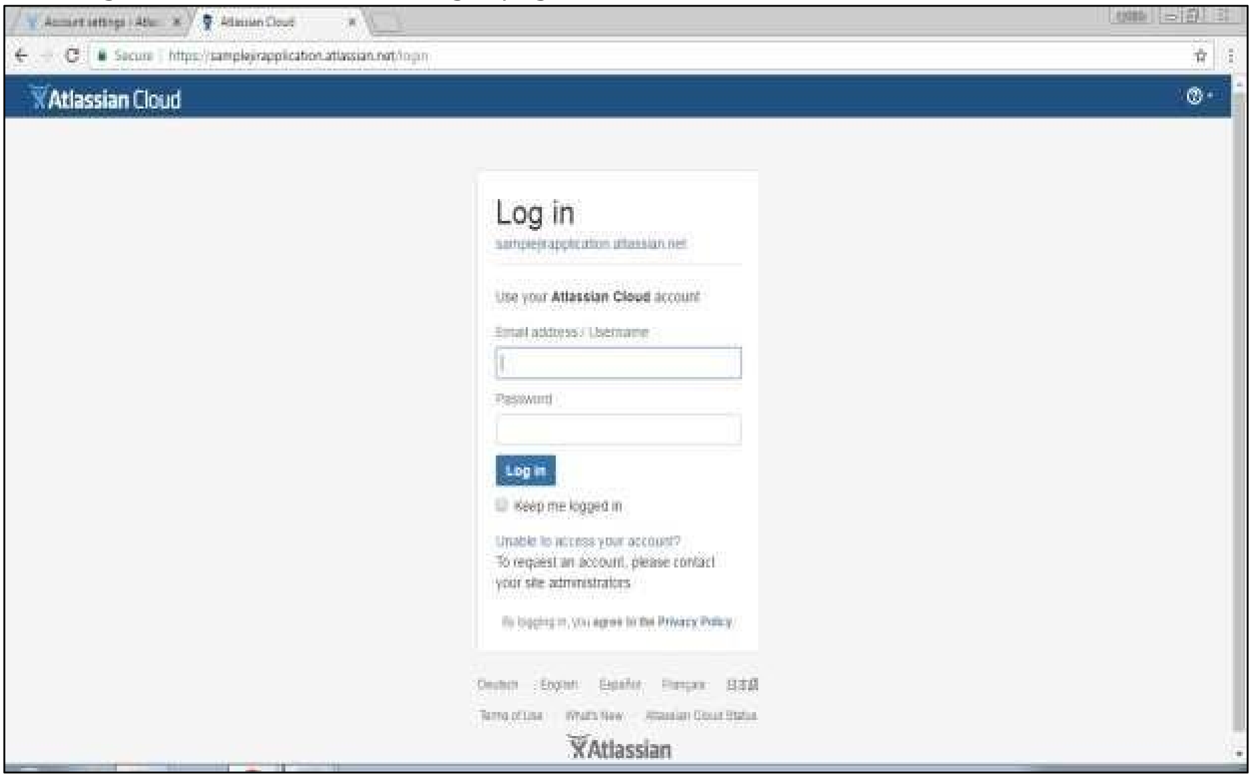
Once the user fills in all the details along with the sample website name, user has to click on the **Start now** button. The following screenshot shows how to claim your site and provide your credentials to start it.



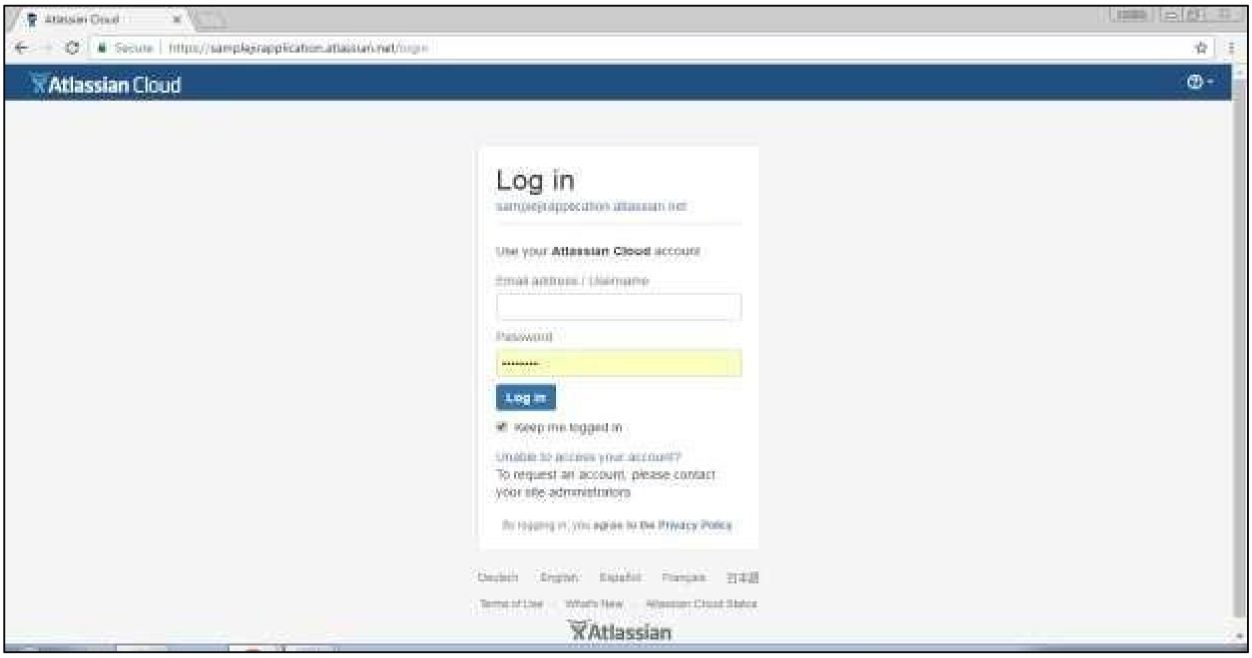
It will take a few minutes to start the requested sample JIRA website. Once it is done, the JIRA login page will display and the user can see the given sample website name in the

7. JIRA – Login

browser's address bar. The user can now directly access this link to navigate to JIRA. The following screenshot shows the login page of JIRA.

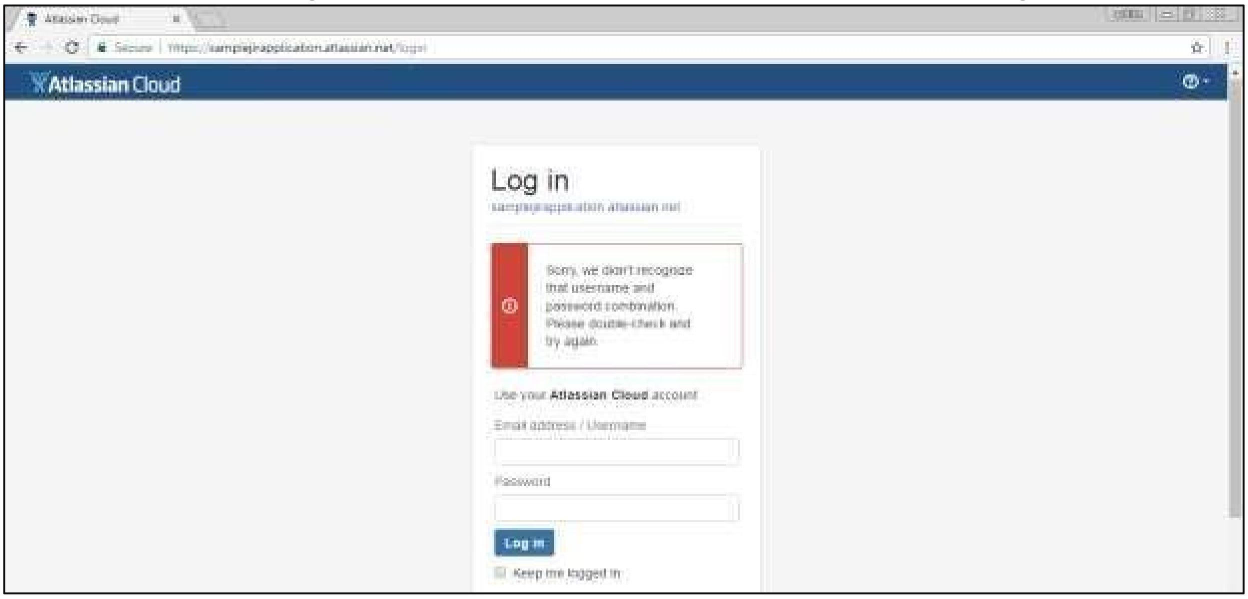


To login to JIRA, go to your sample website. It will open a login page. Fill in your registered email address/username and Password. Click on the Login button. The following screenshot shows how to login into JIRA using your credentials:

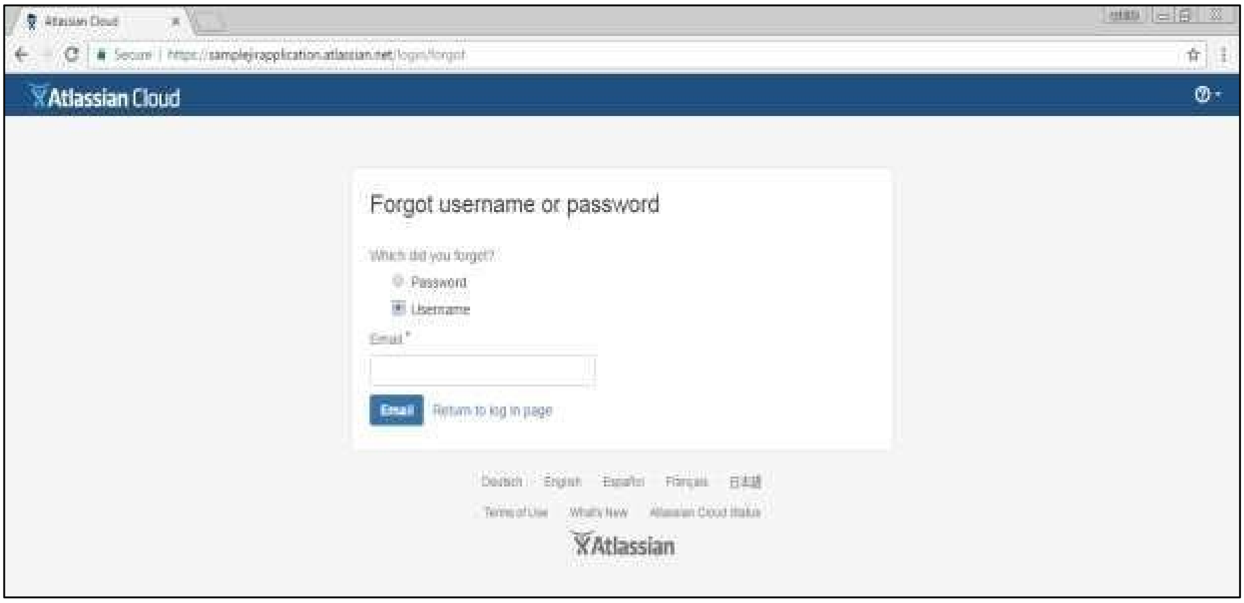


Common Login Errors

In case of any unsuccessful login, an error message displays. The following screenshot shows the error message a user receives, if the credentials are not matching or incorrect.



To rectify this scenario, click on "Unable to access your account", then select the appropriate option and fill in the details. Click on email. The following screenshot shows how to recover the username, in case the user has forgotten it.

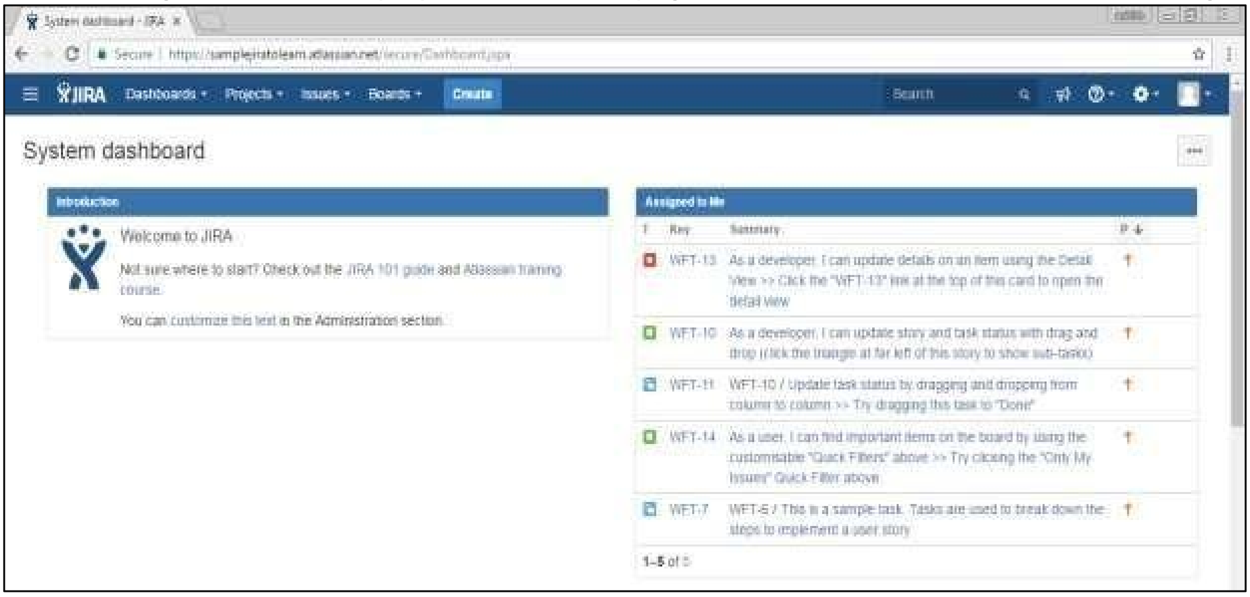


The user will get an email with the details of his username or a link to reset the password.

Successful Login

On a successful login, the system dashboard will display if the account is associated with any project by the admin, or if a user can create a sample project as explained in the earlier chapters.

The following screenshot displays the welcome page/dashboard of JIRA on a successful login.



After logging into JIRA, the Dashboard is the first page that shows up. The Dashboard is customized by the Admin. Based on the roles, the admin can set the access of JIRA. Even the admin has the right to change colors and the logo of JIRA.

ImportantPointsoftheDashboard

8. JIRA – Dashboard

Following are some of the most significant points the users should understand before using the JIRA Dashboard.

- The navigation bar, present at the top of the JIRA page, will be the same across all the pages/screens of JIRA. Dashboard, Projects, Issues, Boards and Create are the main links. These links have many sub-links to navigate other functionalities.

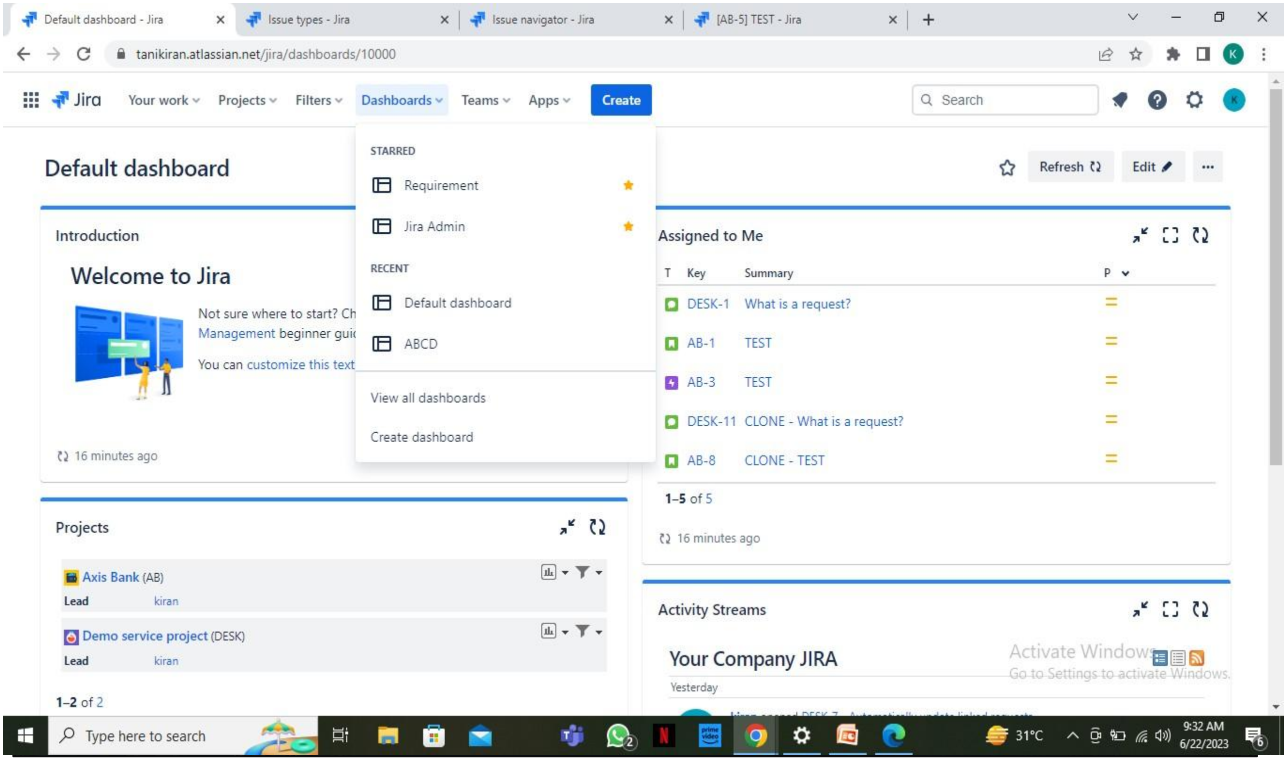
- Navigation bar contains links that provides a quick access to the most useful functions of JIRA.

- Just under navigation bar, there is a System Dashboard.

- The information provided in the system dashboard area can be customized by the Admin.

- By default, it has three main sections – **Introduction**, **Assigned to Me** (displays Issues list assigned to users) and **Activity Stream** (Activities done by the users).

The following screenshot shows the overview of the Dashboard page of JIRA:



TypesofProjects

The Projects link has several sub-links, which are explained in detail for better understanding.

- **Current Project:** It displays the name of the Project where the user is currently in or is viewing the dashboard of the project. By clicking at Project name, it will display the list of issues associated with the project.

- **Recent Project:** It displays the name of the recent project that the user has accessed, if exists, where the user can navigate by clicking on the project listed under this header.

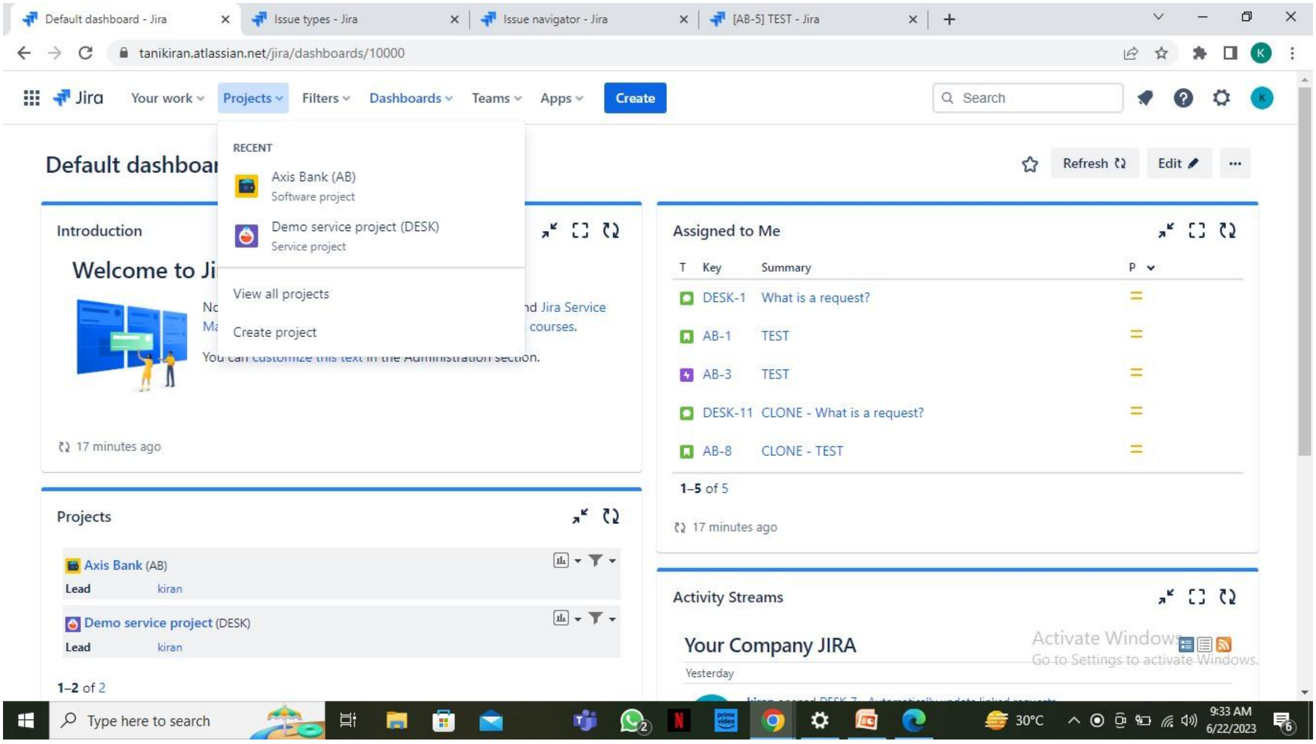
- **Software:** It is the sub-link to navigate the list of projects, which are listed in the Project Type as Software.

- **Business:** It is also a project-type. By clicking here, it will display the list of business project types.

- **View all Projects:** It displays all the projects, which are associated with the logged in user.

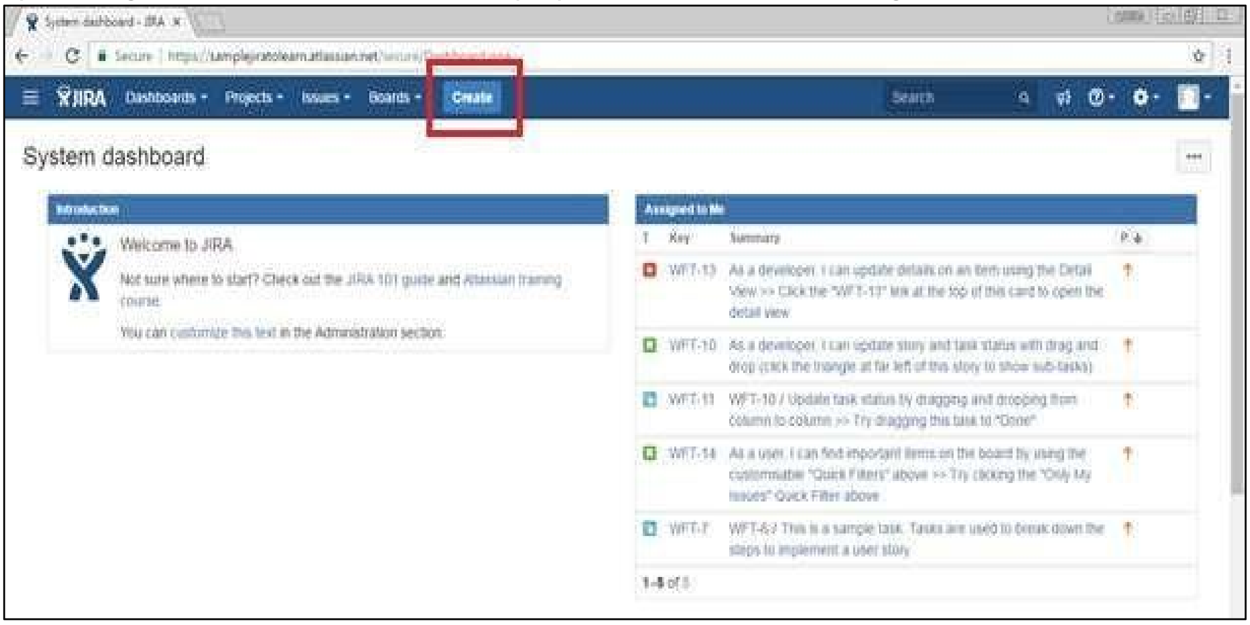
- **Create Project:** This link is usually accessed by the Admin or it depends on various roles. If this link is visible, a user can create a new project by following the instructions given there.

The following screenshot shows the different sub-links under the Project category.

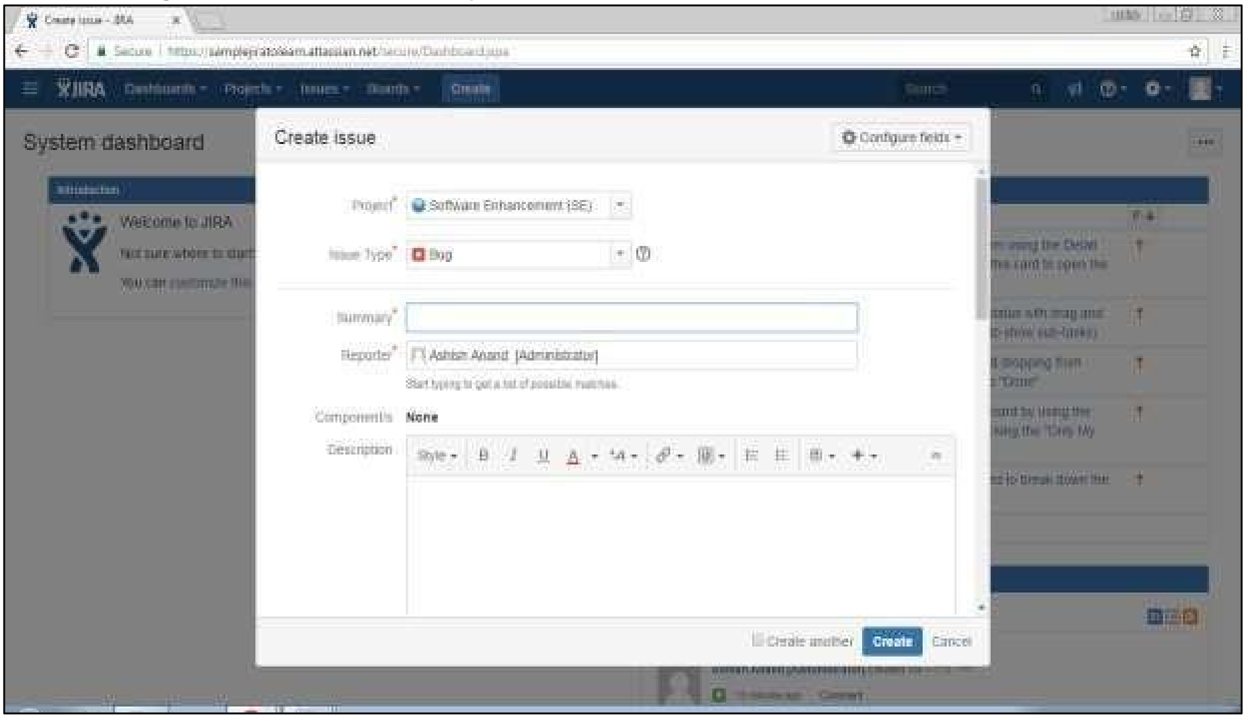


TheCreateButton

By clicking on the Create button, it displays the **create form** to log an issue.



The following screenshot shows required fields and other fields to create an issue:



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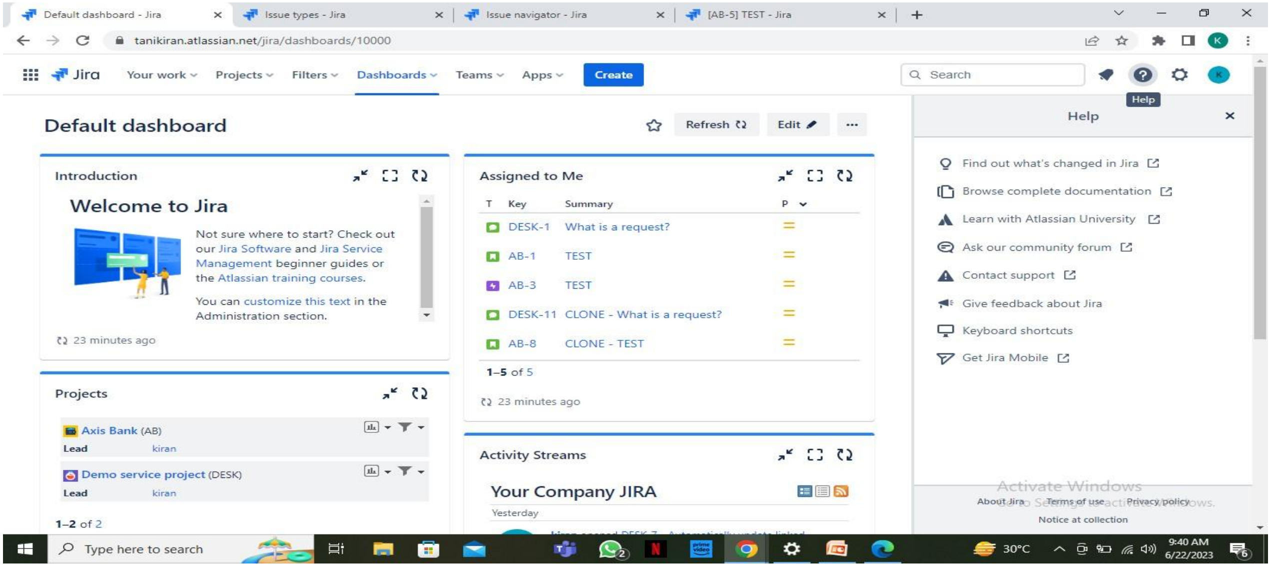
TheHelpLink

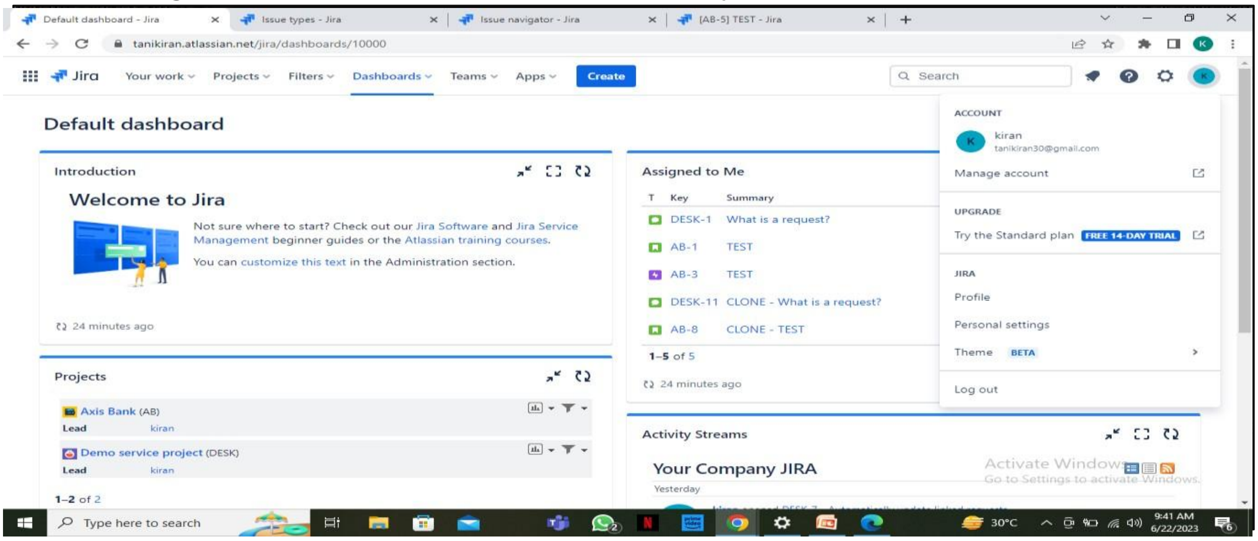
The Help link provides different useful documentation about JIRA. It provides the details of JIRA as well by clicking on “About JIRA”. Similarly, this link also provides new release features by clicking on “What’s new”. Keyboard shortcuts have much useful keyboard navigation for users that saves time. The following screenshot shows the Help link and different sub-links available in it.



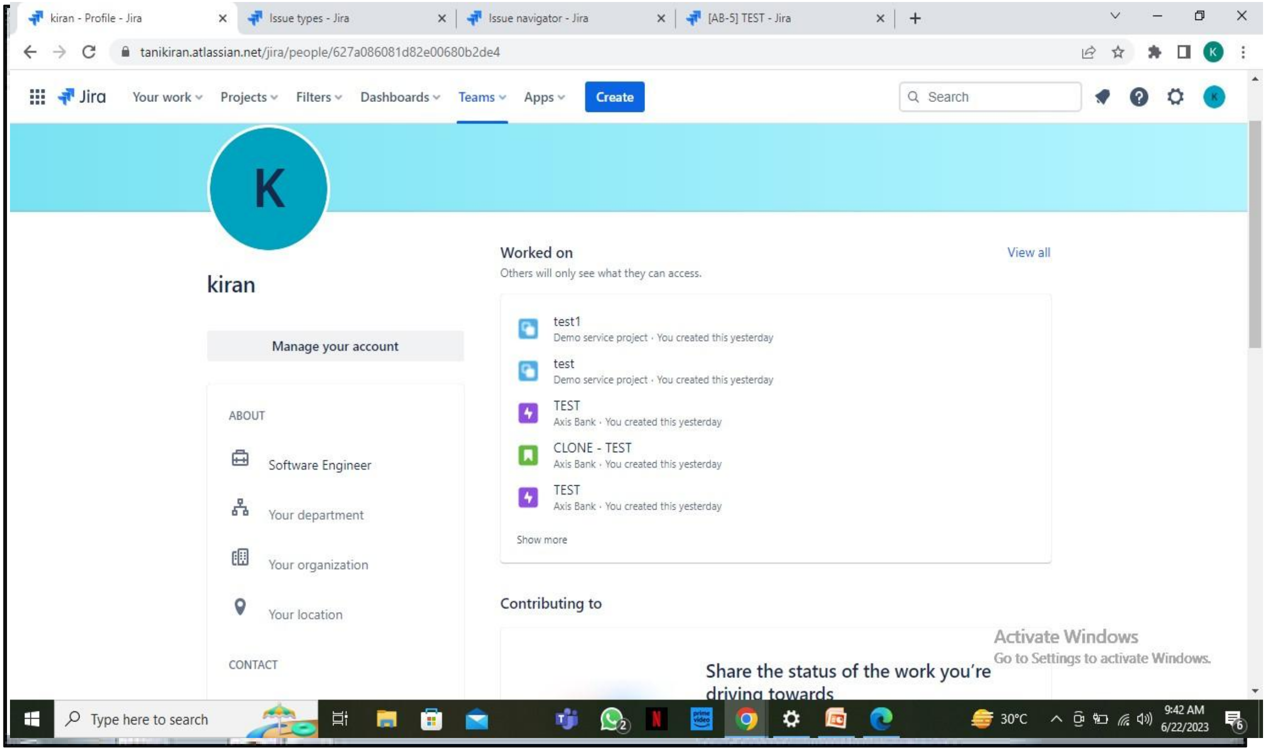
UserProfileButton

By clicking on the profile link, the user can view his profile details and manage this section. By clicking on Logout, the user will get back to the login page and will not be able to access the project details without logging in again.

The following screenshot shows available functionality under User-Profile section:



By clicking on the edit symbol, the user will be able to edit profile details like – Summary Details, Preferences, etc. The following screenshot shows how to edit the profile by clicking on the Edit (highlighted in red outline) icon at each section:



On the right side, the user can see the activity stream performed by the logged in user.

9. JIRA – Issue Types

Since JIRA tracks all the tasks, the sub-tasks or even a work as an Issue, there are several types of Issues to identify the work and categorize the similar issues.

An Issue is classified as follows:

- **Sub-Task:** This is the sub-task of an issue. In a logged issue, there can be different tasks to resolve it, which are called as sub-tasks.

- **Bug:**A problem that impairs or prevents the functions of the product.

- **Epic:** A big user story that needs to be broken down. Created by JIRA Software - do not edit or delete.

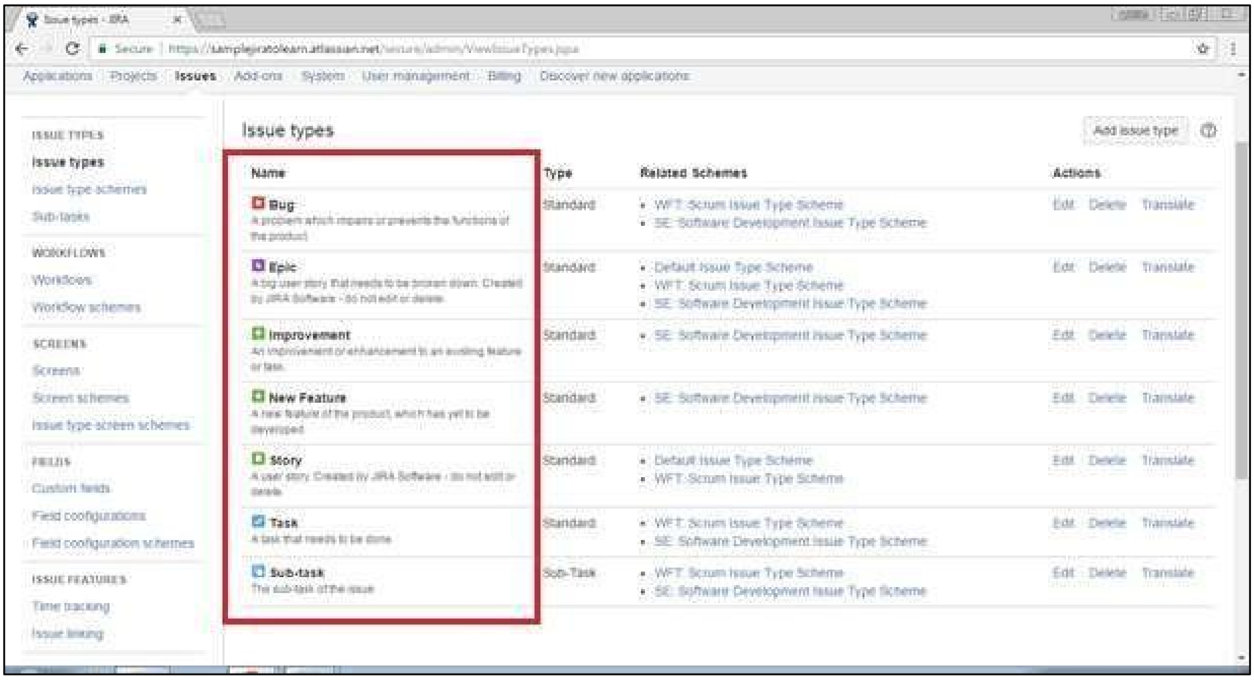
- **Improvement:** An improvement or enhancement to an existing feature or task.

- **New Feature:** A new feature of the product, which is yet to be developed.

- **Story:** A user story. Created by JIRA Software - do not edit or delete.

- **Task:** A task that needs to be done to achieve team's goal.

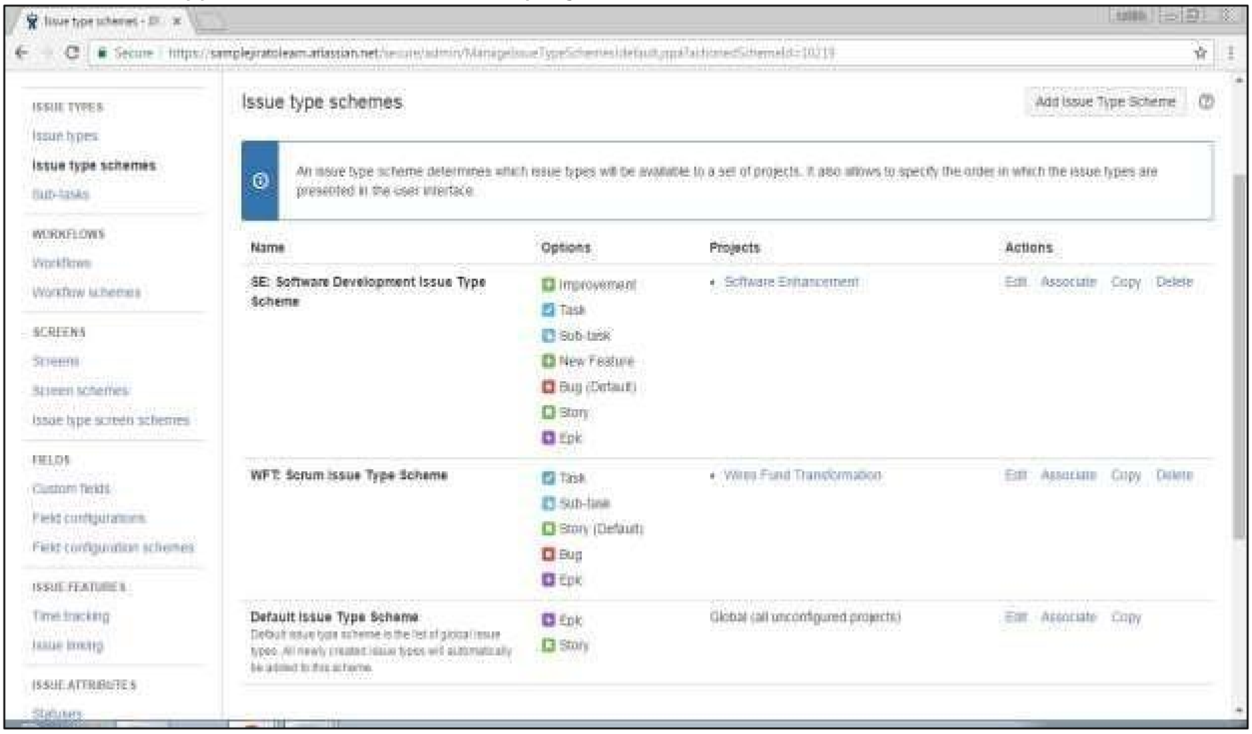
If a user logs in as Admin and navigate to Settings → JIRA Administrator → Issues, all the listed issue types will display. The following screenshot shows all the available issue types in JIRA.



Issue Type Schemes

An issue type scheme determines which issue types will be available to a project or set of projects. It also manages specifying the order in which the issue types will present in the user interface of JIRA, while creating an Issue. An issue type scheme generates as soon as the project is added in the JIRA.

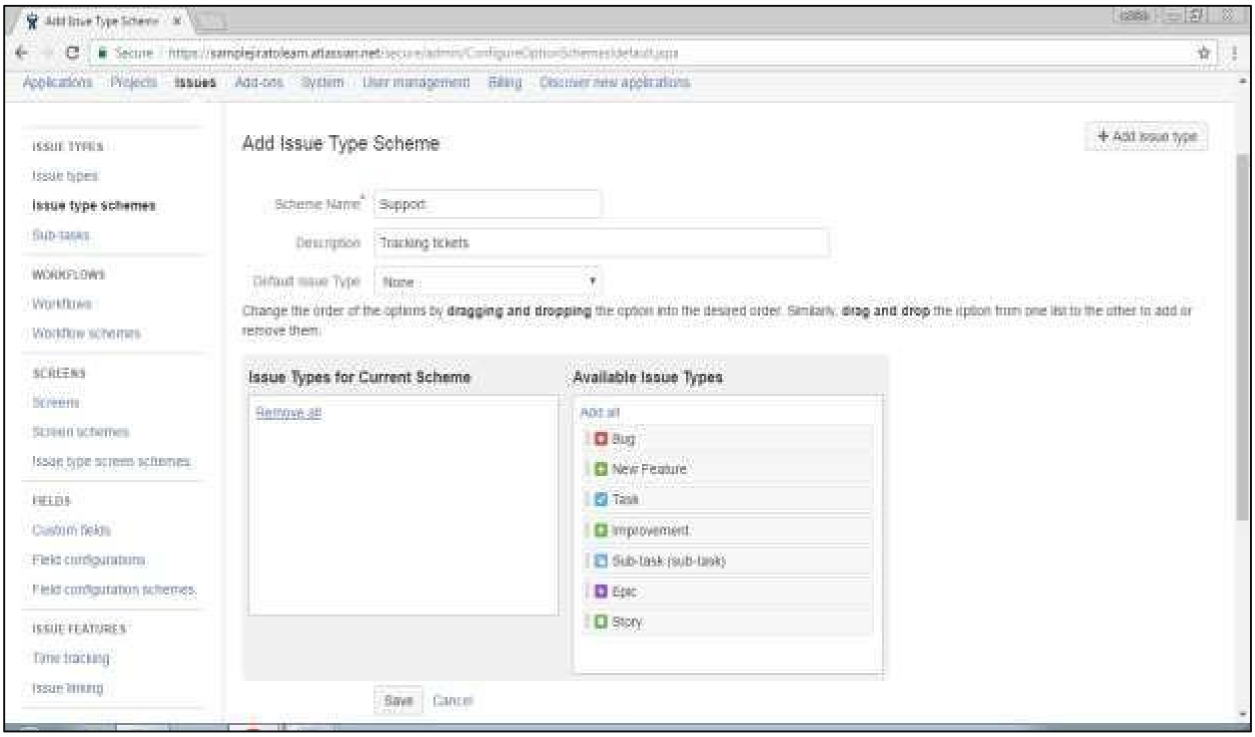
Here, one scheme is by default named as the Default Issue Type Scheme and others are project schemes. The default issue type scheme is the list of global issue types. All newly created issue types will automatically be added to this scheme. The following screenshot shows Issue type schemes of different projects.



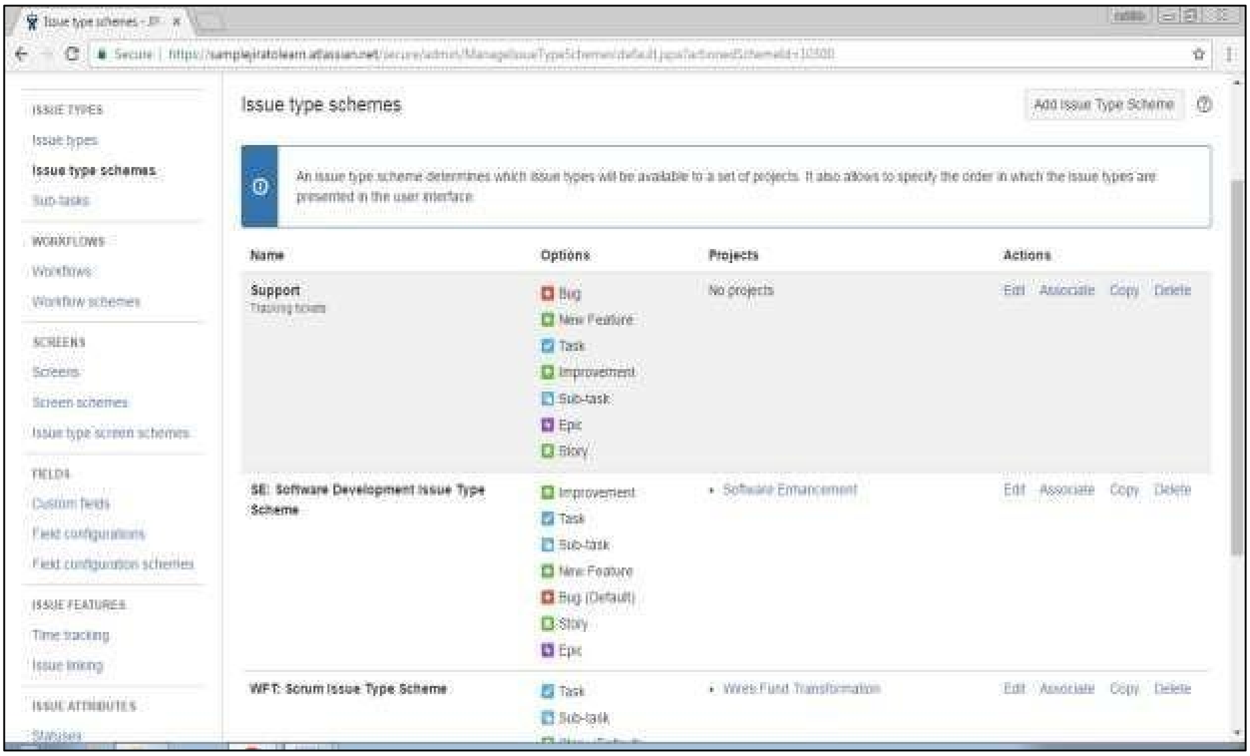
By clicking on the Add Issue Type Scheme button at the top right hand corner, the user can add a user defined scheme.

Enter the Name, Description and Select the Issue Type for the Current scheme from the Available issue type list. The following screenshot shows how to add a new type schema by providing the required and optional fields.

JIRA



Click on Save. The new schema will appear in the list. The Following screenshot shows how the page display after adding a new Issue Type schema:

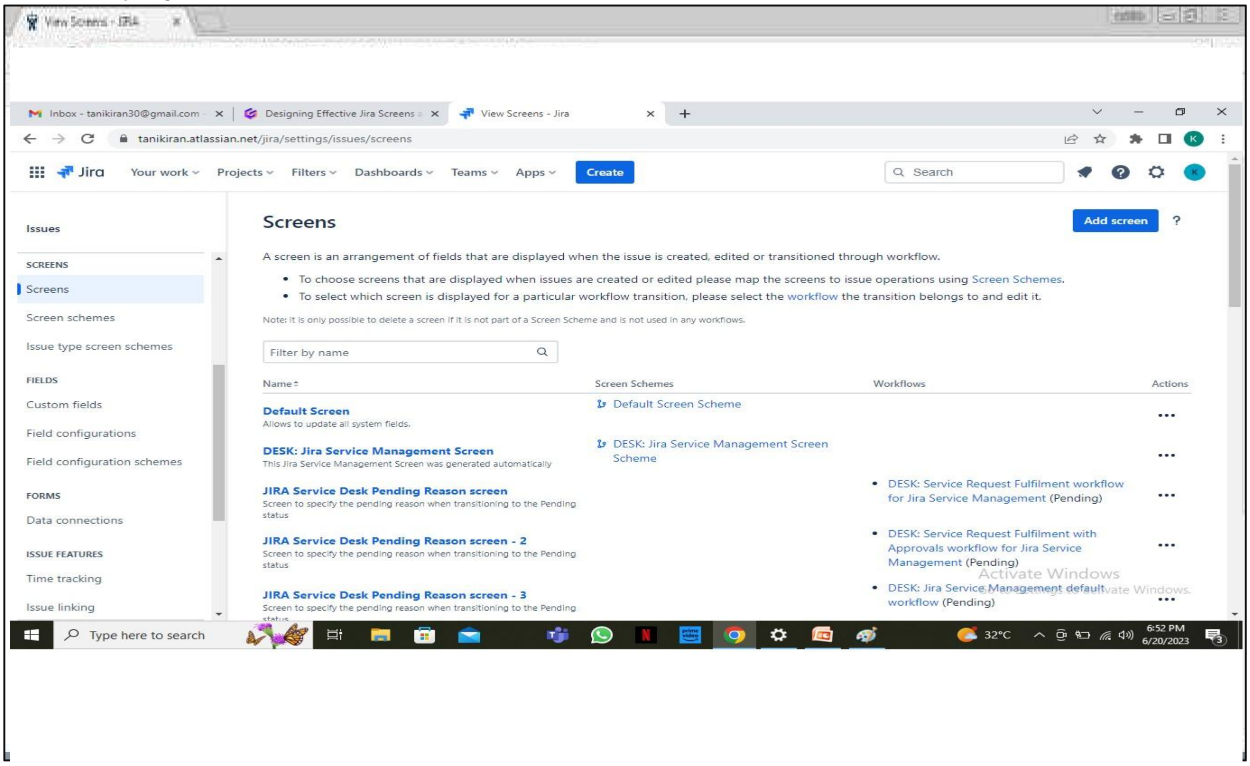


By clicking on Edit, the user can edit the details. By clicking on Associate, the user can associate this scheme to a project. Copy and Delete is used for copying and deletion of the same scheme.

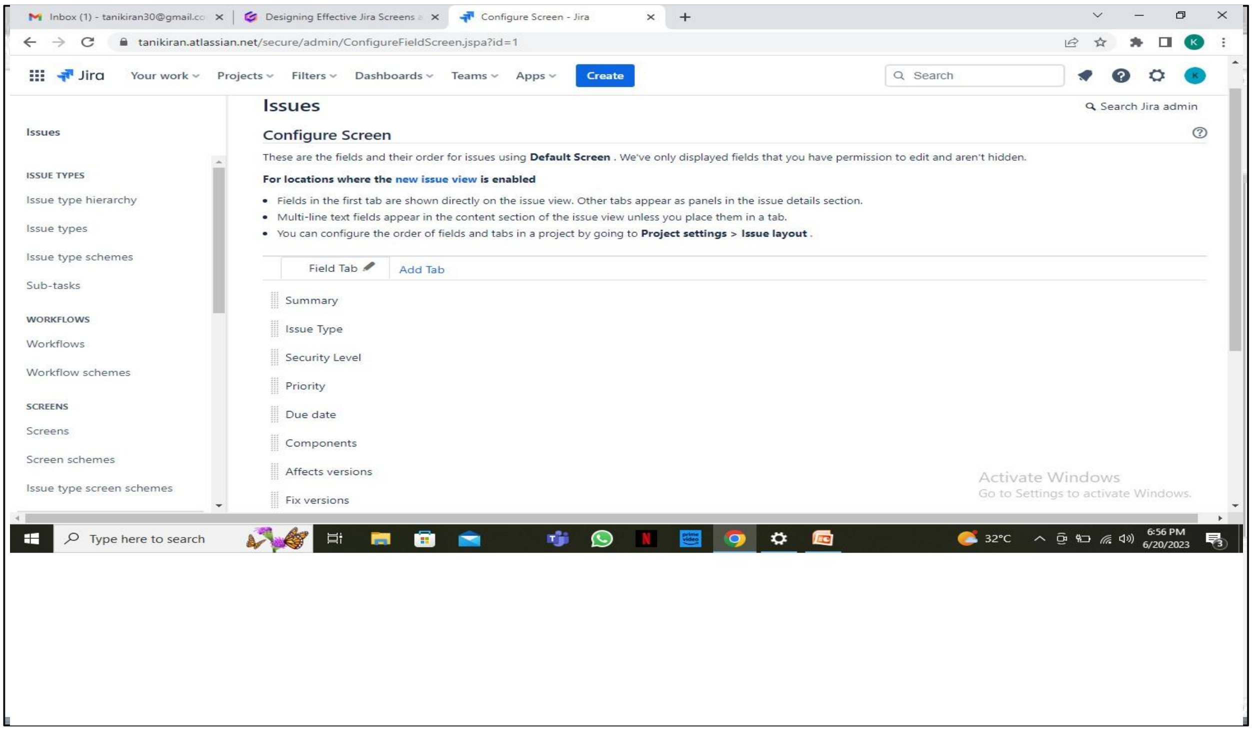
10. JIRA – Screens

ViewScreen

It is the arrangement and representation of fields to display in UI whenever a new issue is created or existing issues are modified and issue transitioned through one status to another. If a user logs in as Admin and navigate to Settings → Issues → Screens, he will be able to see all the available screens. The following screenshot shows the available screen for different projects.

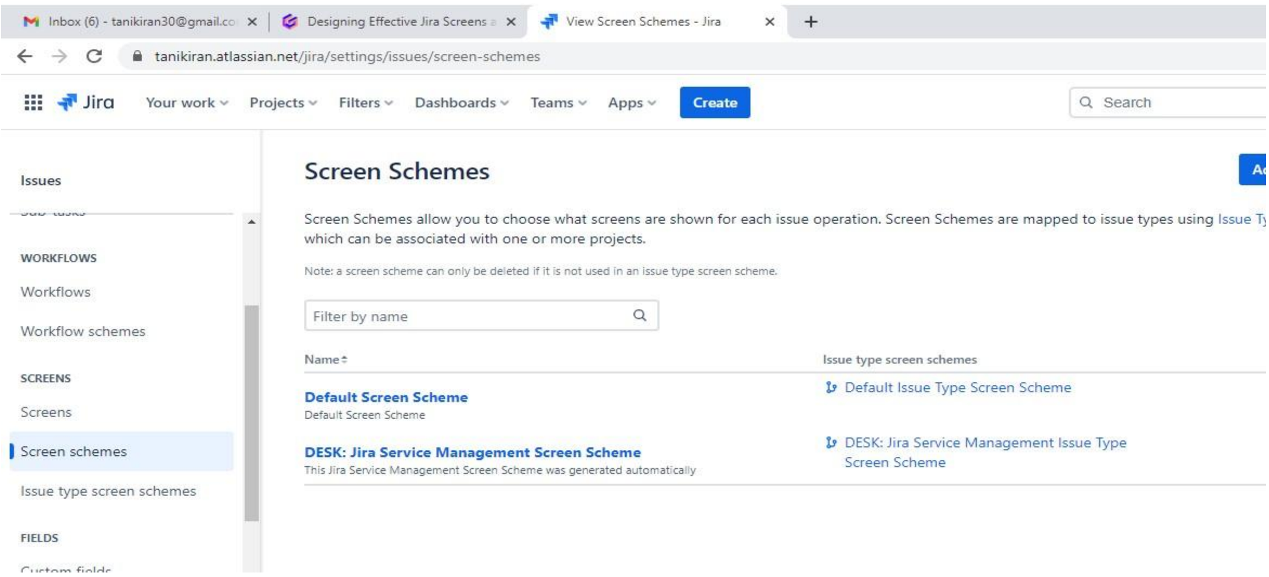


By clicking on configure, the user will be able to see all the available fields with this screen. Whereas, in the organized/arranged way of order, it will display at the UI. The following screenshot shows how to configure the screen fields.



ScreenSchemes

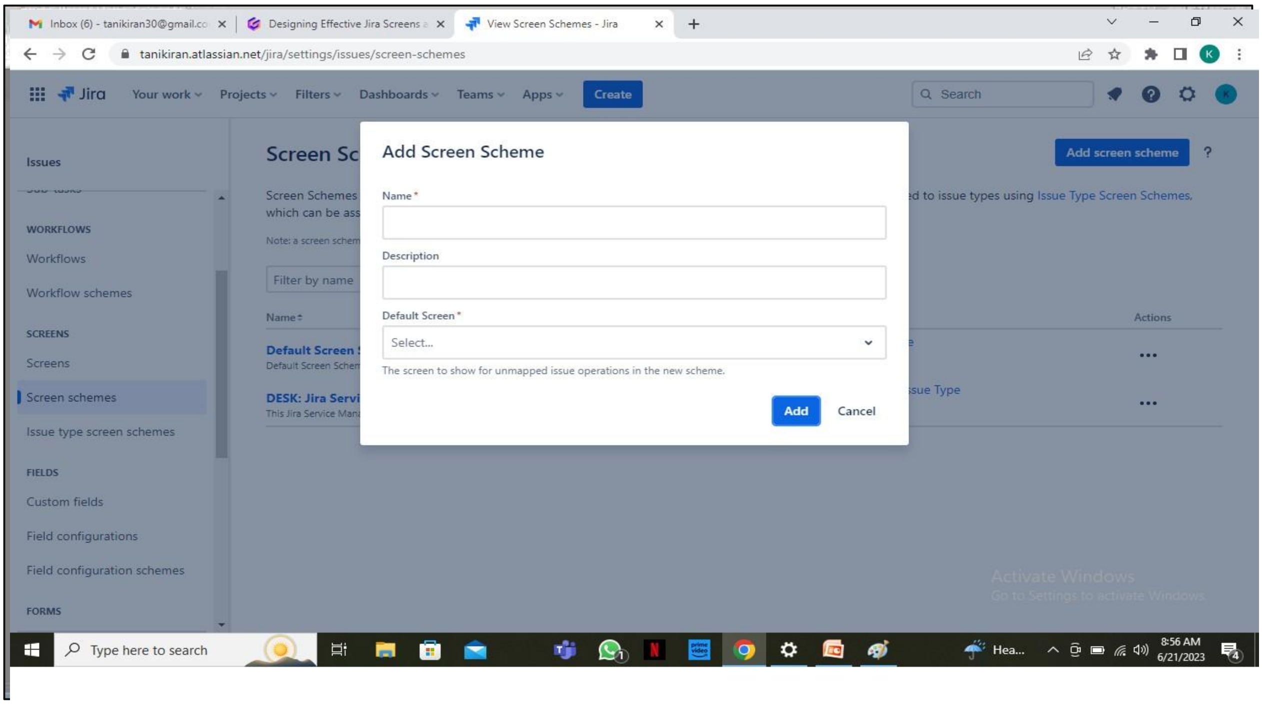
Screen schemes provides an option to choose fields, which should display when a particular issue type is selected. A screen scheme is mapped with issue type using the Issue Type Screen Scheme. It can be associated with one or more project. A screen scheme can be deleted only when it is not used by any Issue Type screen scheme. The user can add a new screen scheme by clicking on the Add Screen Scheme button. The following screenshot shows the different screen schemes available for the listed projects.



Provide all details and the click on the ADD button. The following screenshot shows how to

11. JIRA – Issue Creation

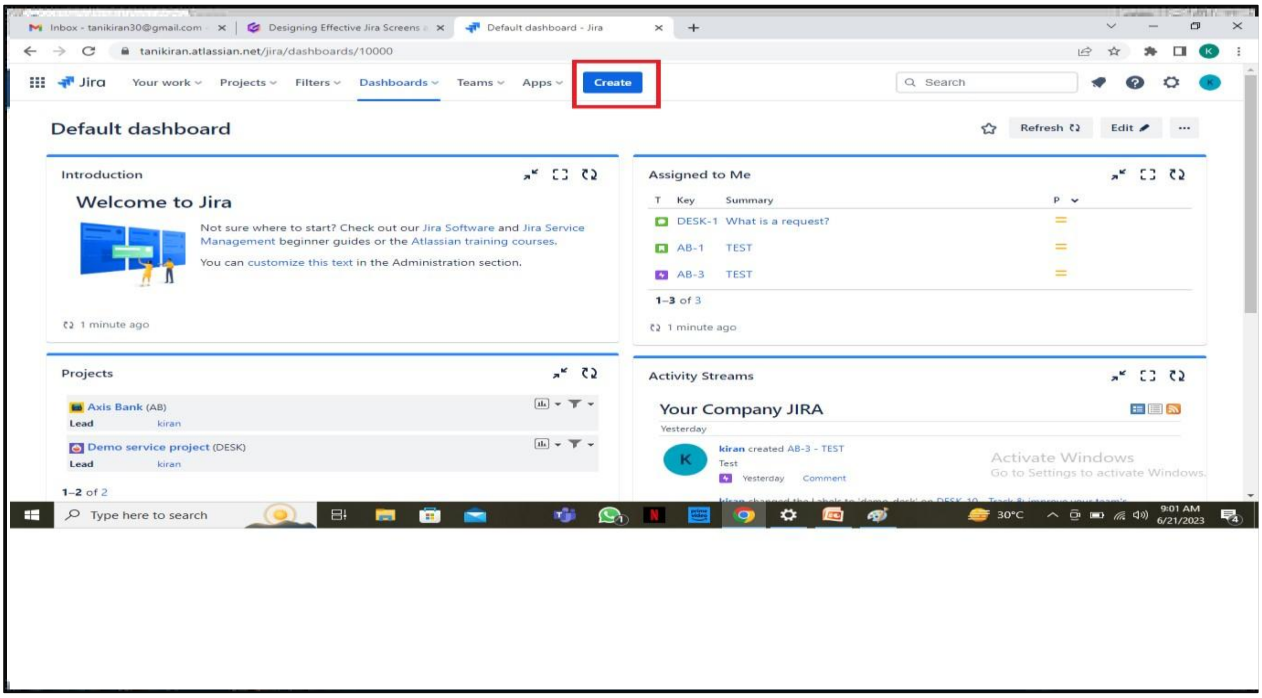
add a new screen scheme.



To create an issue in JIRA, the user should have Create Issue permission in the project. Admin can add/remove the permission.

StepstoFollow

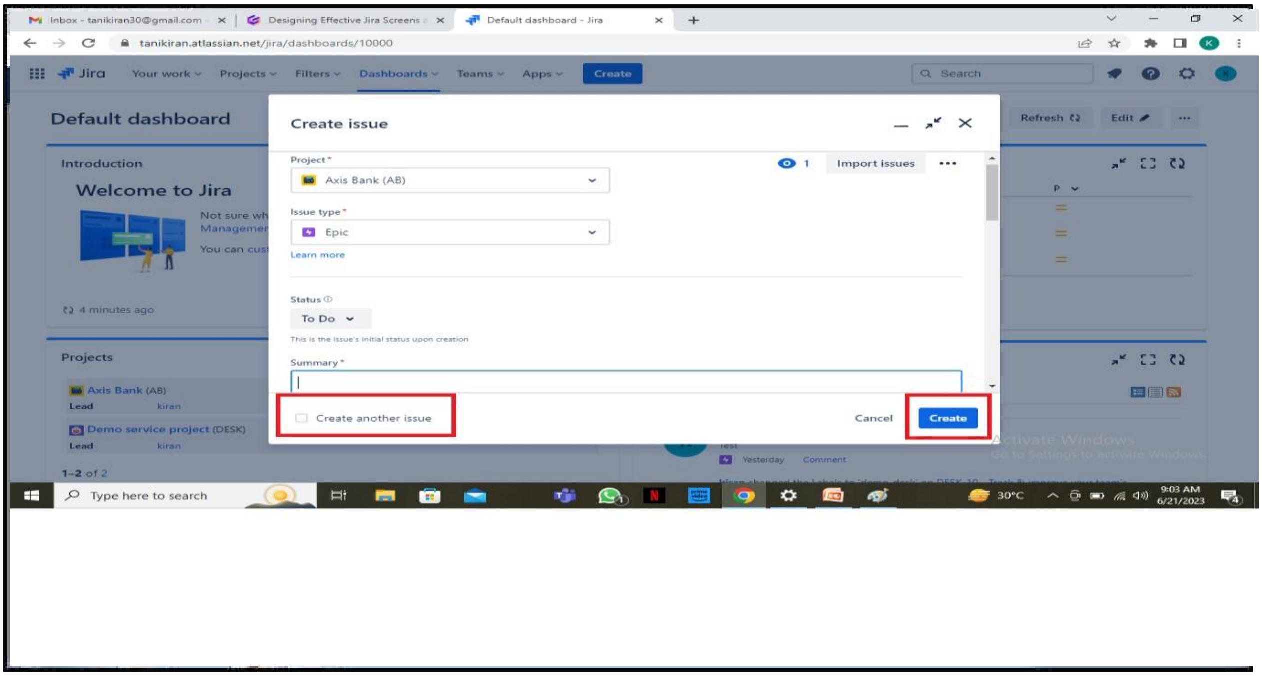
Click on the Create button in the navigation bar to open the create issue dialogue box.



To complete the process of creating an issue, we should follow the pointers given below.

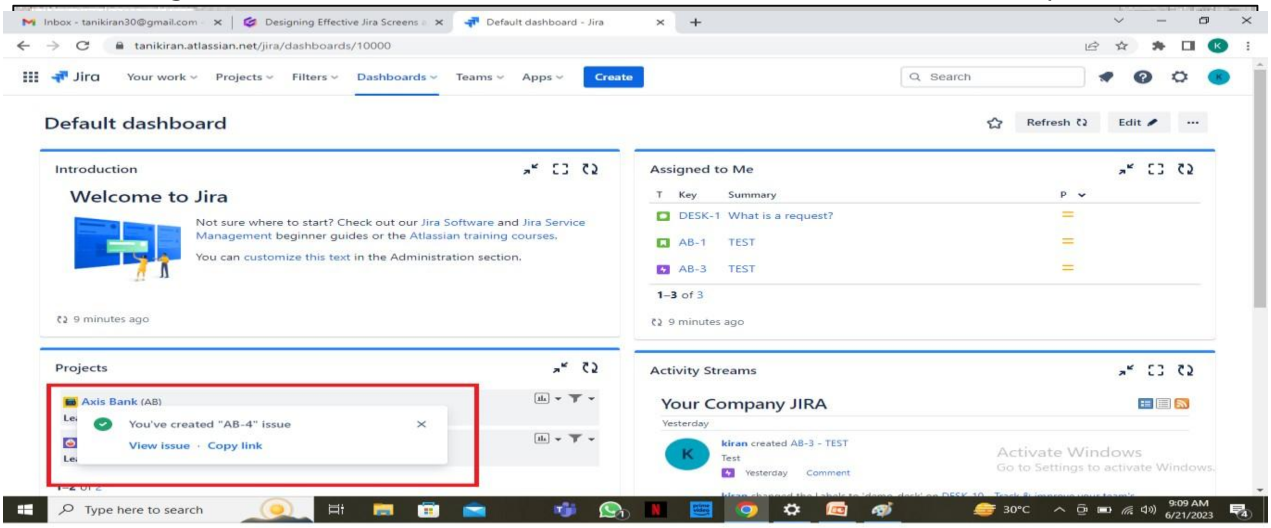
- Select the Project where the issue is.
- Select the type of issue, whether it is a bug/new feature/story, etc.
- Write a one-line summary to provide the overall idea about the issue.
- Write the details of the issue in the **Description** field. Explain the issue, so that stockholders can understand every detail of the issue.
- To create a similar type of issue in the same project and issue type, check the checkbox of “Create another” otherwise keep it as unchecked.
- After entering all the details, click on the Create button.

The following screenshot shows how to create an issue by providing the required and optional details.



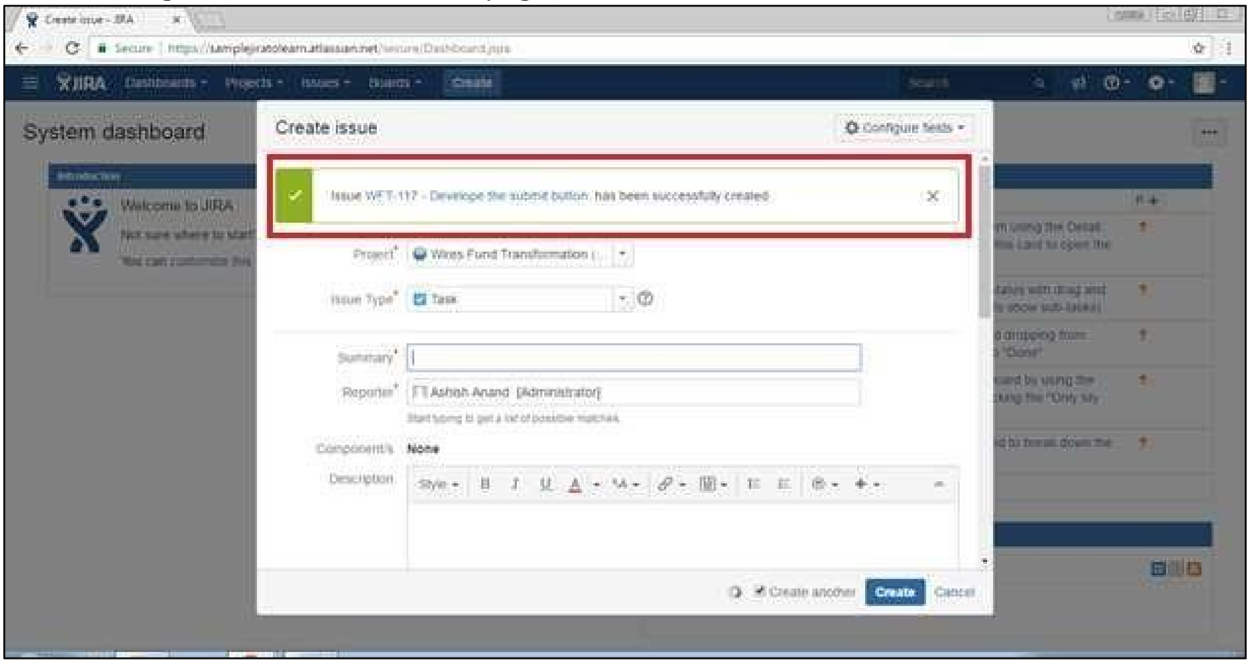
If the "Create another" checkbox is not checked, after clicking on the Create button, the user will have to navigate to the Dashboard and a pop-up will display on the right side with an **issue id** and **summary**.

The following screenshot shows how to know whether the issue is successfully created or not.



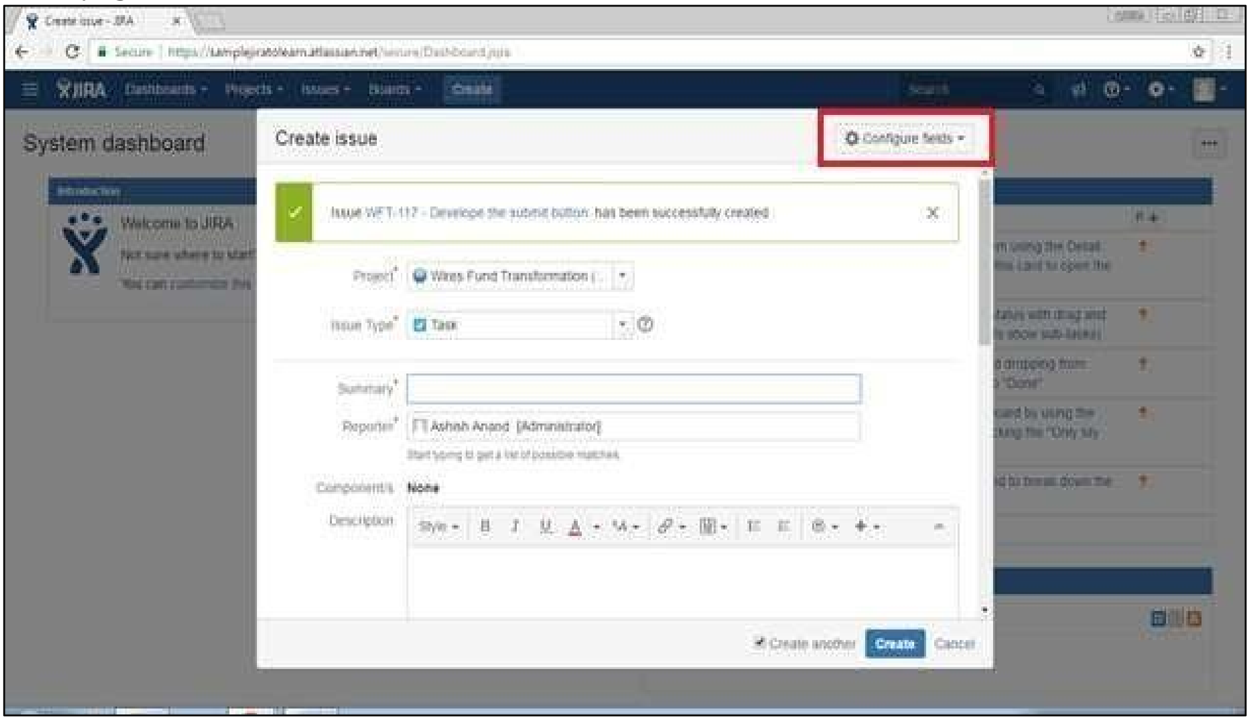
If the "Create another" checkbox is checked while clicking on the Create button, the user will get a new create issue page along with the **issue id**.

The following screenshot shows the page, if the user has checked the "Create another" box.

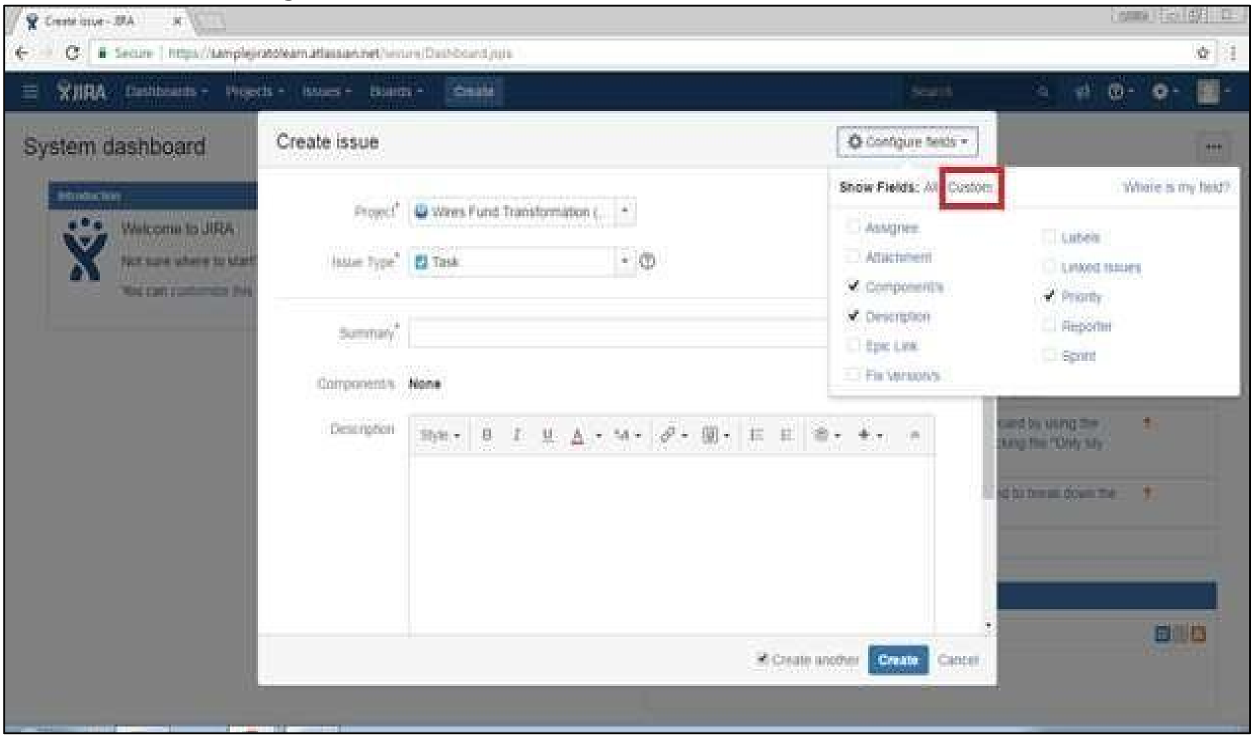


Configure Fields

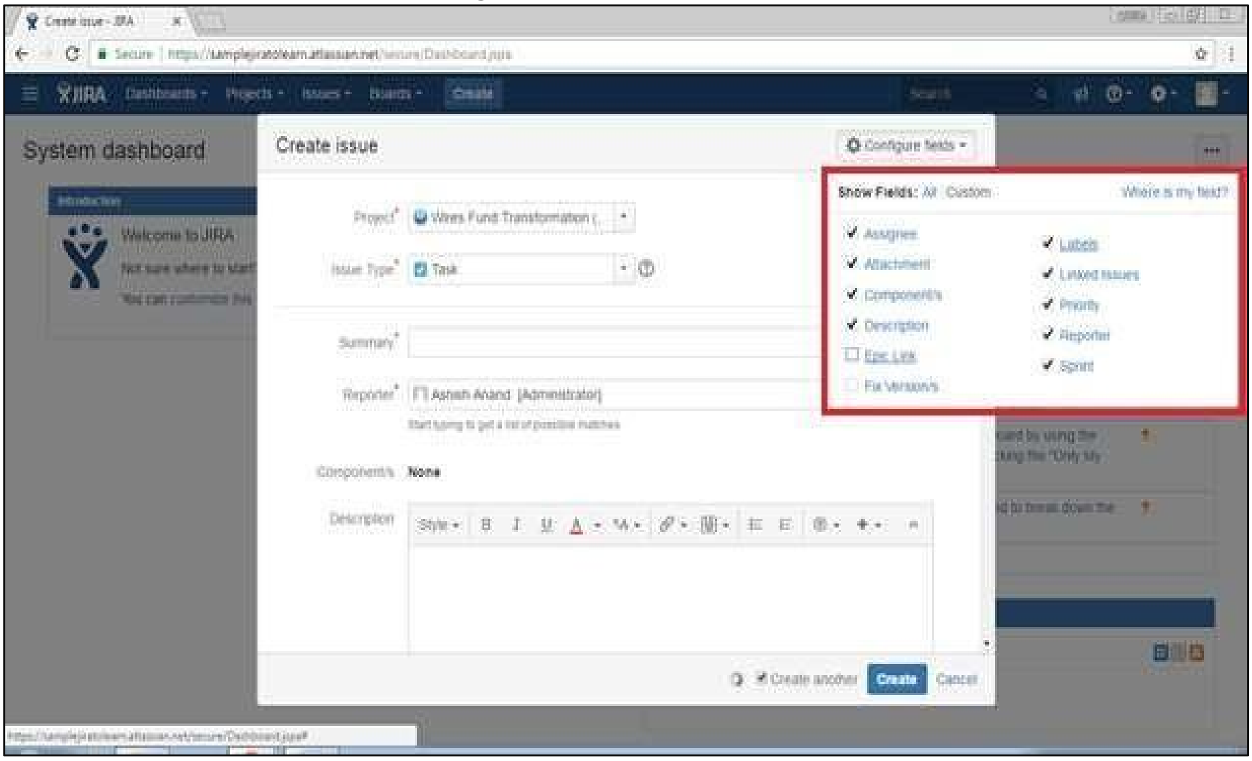
To add other fields in the Create Issue form, click on "Configure fields" at the top right hand side of the page. The following screenshot shows how to configure the fields in the Create Issue page.



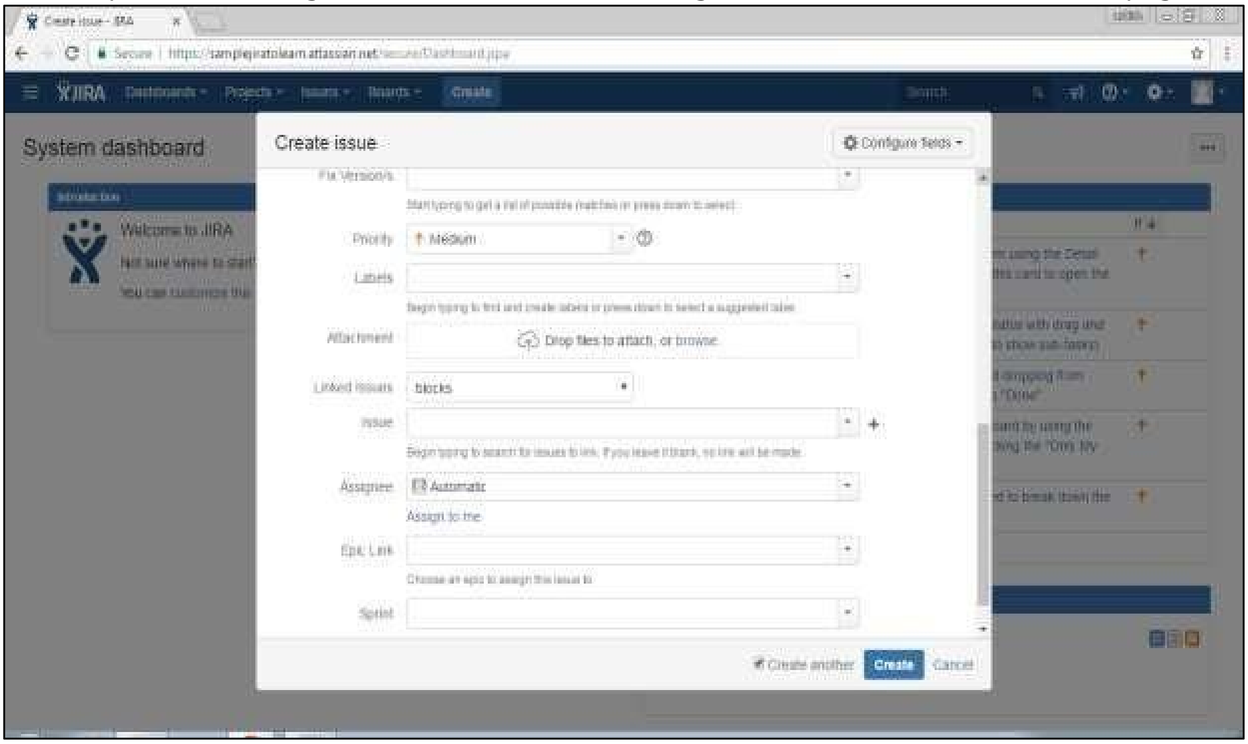
After clicking on the **Configure fields** button, a drop down box will be displayed, click on Custom. The following screenshot shows the available fields under the **Custom** tab.



By checking and unchecking the checkboxes to show and hide, fields will be added or cleared from the form. The following screenshot shows the available fields under the **All** tab.



Now navigate to Create Issue, all fields based on choices will be displayed in the form that shows up. The following screenshot shows the configured fields in the Create Issue page.



The fields in the Create Issue form are explained below.

- **Priority:** Issue creator can set the priority to resolve the issue as High, Medium, Low, and Lowest.
- **Labels**: It is similar to **Tag**; it helps in filtering out specific types of issues.
- **Linked Issue:** It links other issues that are either dependent on this issue or this issue is dependent on them. Options in dropdowns are – block, is blocked by, duplicate, clone, etc.
- **Issue:** User can link the issue by the **Typing ID** or summary of those that are related to the linked issue field.
- **Assignee:** The person who is responsible to fix this issue. Assignee name can be entered by the issue creator.
- **Epic Link:** An Issue creator can provide an epic link, if the issue belongs to any of those.
- **Sprint:** The user can define in which sprint, this issue belongs to, when this issue should be addressed.

In the next chapter, we will learn how to clone an issue.

12. JIRA – Clone an Issue

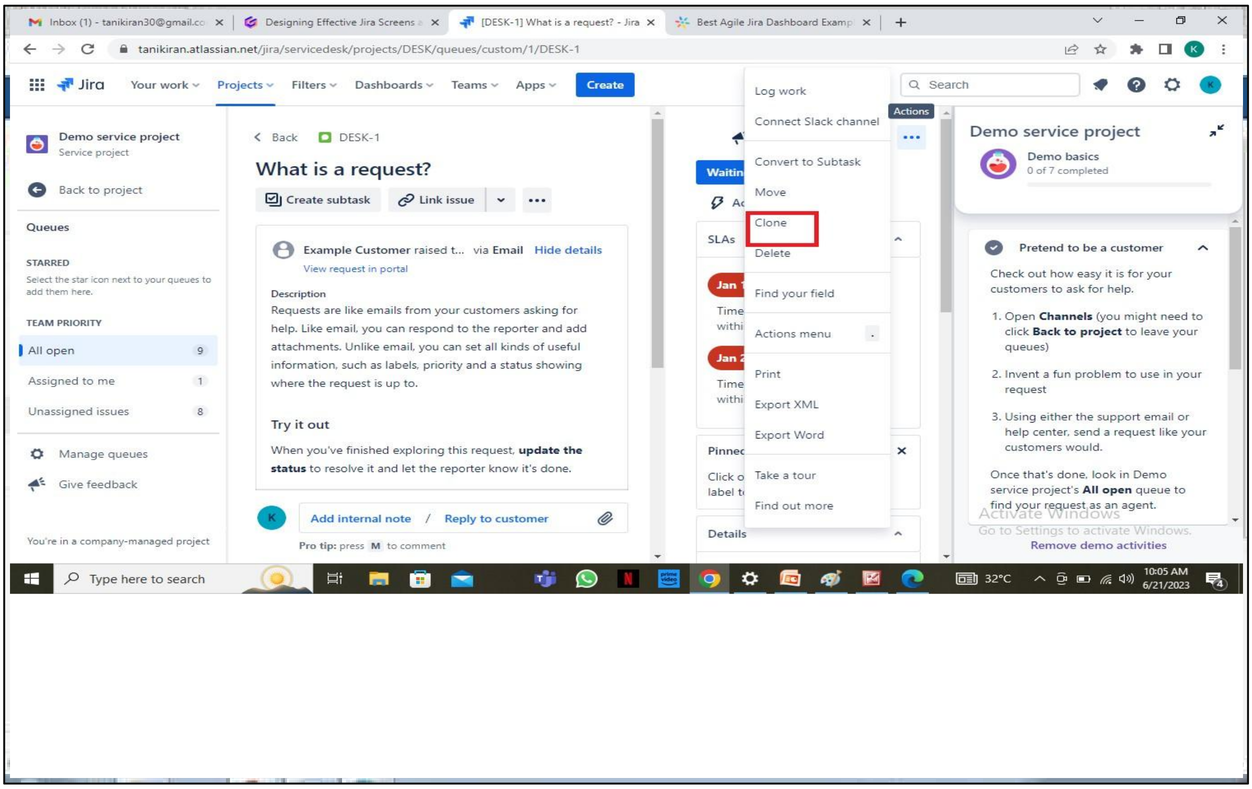
Cloning means to copy. To clone an issue means to create a duplicate issue within the same project. A cloned issue can be treated as a new issue and edited like other issues.

We should consider the following points while cloning an issue.

- A cloned issue is completely a separate issue from the original issue.
- Any action or operation taken on the original issue does not have any impact on the clone issue and vice-versa.
- The only connection between the original and clone is the link that is created.
- Information that is carried from the original issue to clone issue is as follows –
  - Summary
  - Description ○ Assignee ○ Environment ○ Priority ○ Issue Type ○ Security ○ Component ○ Reporter ○ Affects Version ○ Fix Version ○ Issue Links ○ Attachment ○ Projects ○ Content of custom fields are also cloned.
- Information that is not cloned:
  - Time Tracking ○ Comments
  - Issue History ○ Links to confluence pages JIRA

Steps to Follow for Cloning

Open a JIRA issue that is supposed to be cloned. Select More → Clone when the screen appears. The following screenshot shows how to access the Clone functionality.



In the clone screen, there are a few options given to the users, which are as follows:

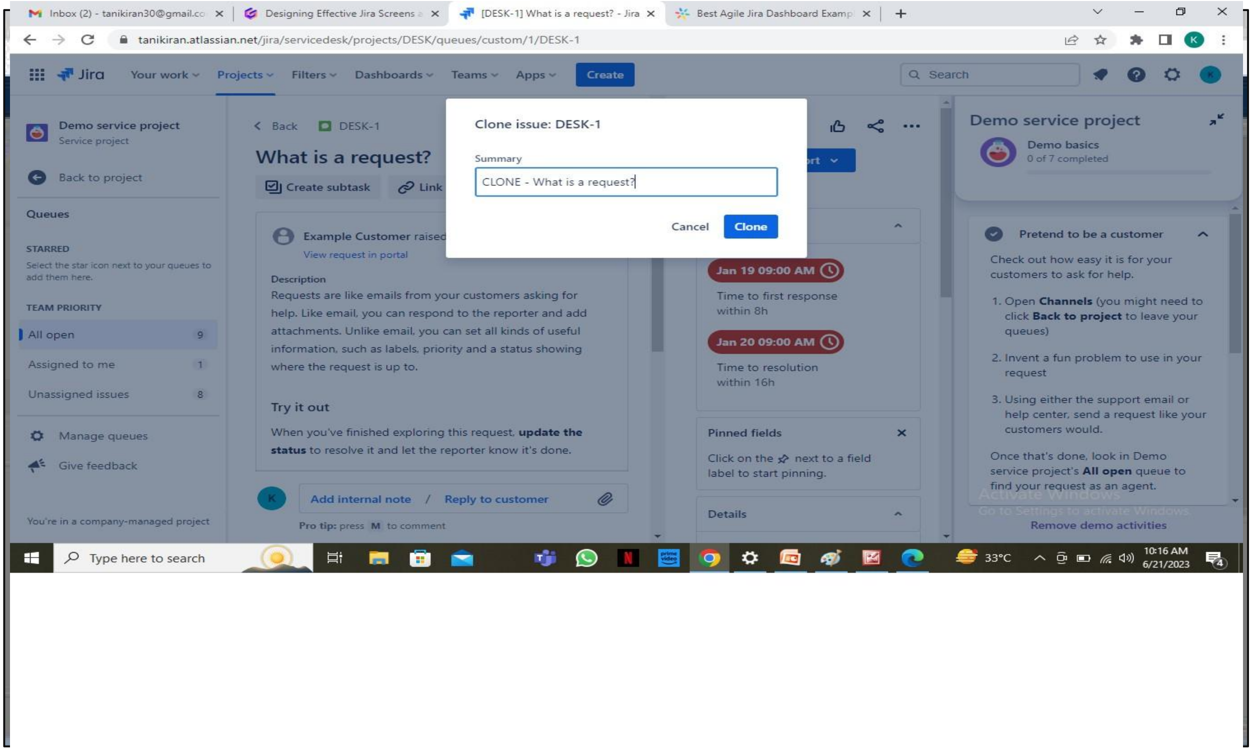
•A user can change the summary while cloning it.

•If the issue contains links to other issues, a user can check the checkbox to contain the clone issue or uncheck if the user does not want to be a part of the clone issue.

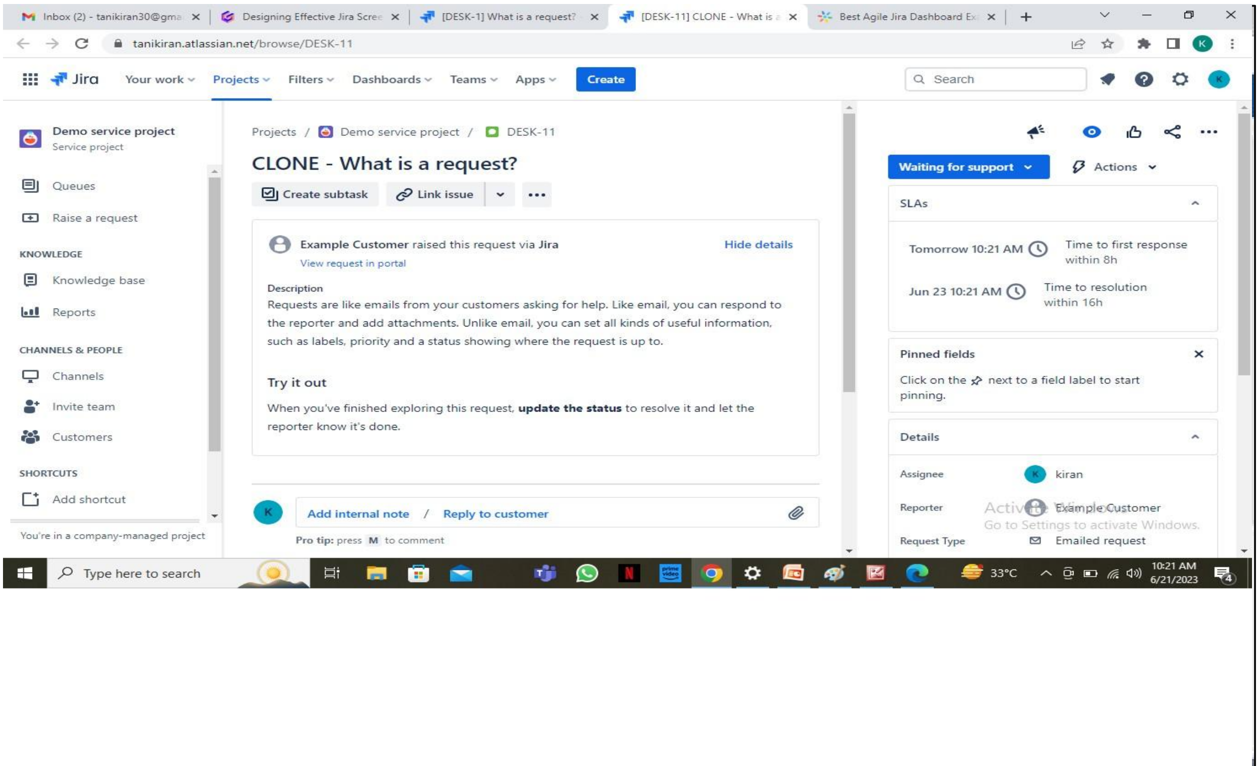
•If the issue has sub-tasks, the user can select/deselect the checkbox to contain the sub-tasks in clone or not.

•The same is applicable for attachment as well.

•It also gives an option, whether to carry or not – the sprint value to the new clone issue. The following screenshot shows how to clone an issue by providing the necessary details.



The next step is to click on Create. It will display the clone issue details. If the user does not change the clone words while creating, it can be visible in the summary, links and sub-tasks. The following screenshot shows how a cloned issue is displayed.



An issue can be completed by performing many tasks with different persons like Dev, QA, UAT, Business, Support, etc. To track the progress in each department, sub-tasks are created in an issue and assigned to the concern person. Once all the sub-tasks are resolved, the issue can be marked as completed.

13. JIRA – Create a Subtask

Points to Note for Creating a Subtask

The following points are to be considered when creating a subtask.

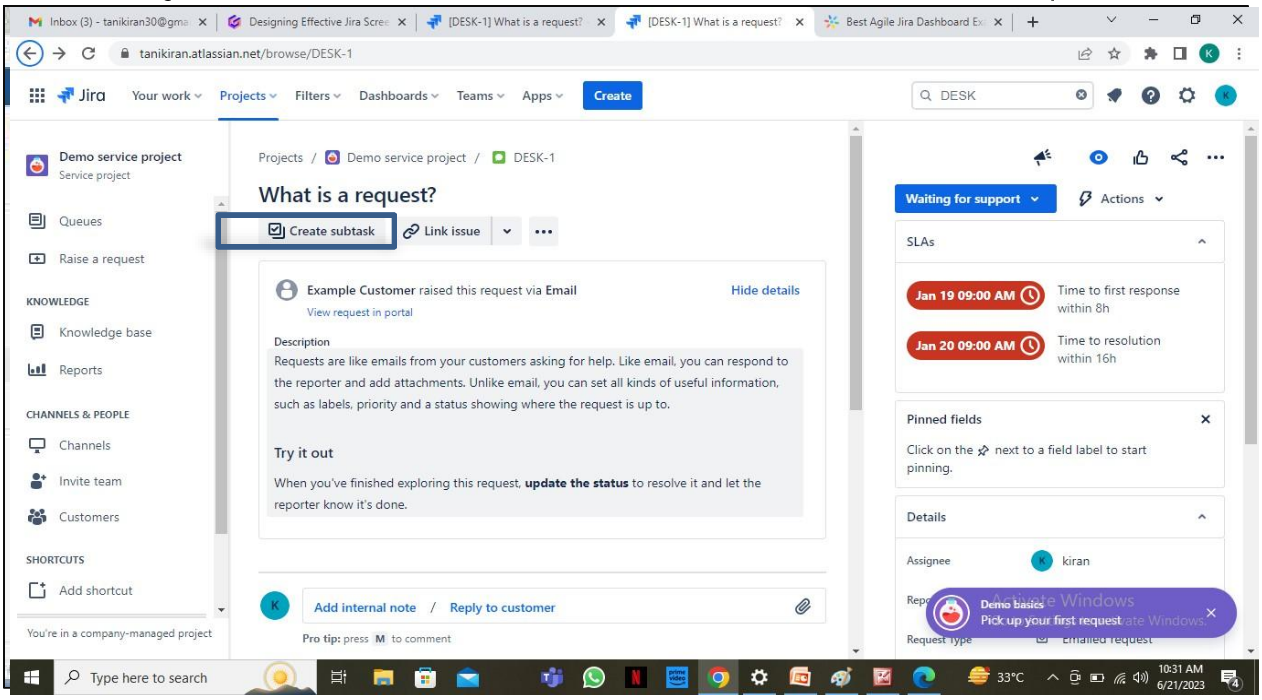
- All subtasks are an essential part of their parent issue.
- All subtasks are visible on the main screen of the parent issue.
- Subtasks always belong to the same project as their parent issue.
- Subtask has all fields that are present in the standard issue.
- Subtasks cannot have a subtask of their own.

Steps to Follow for Creating a Subtask

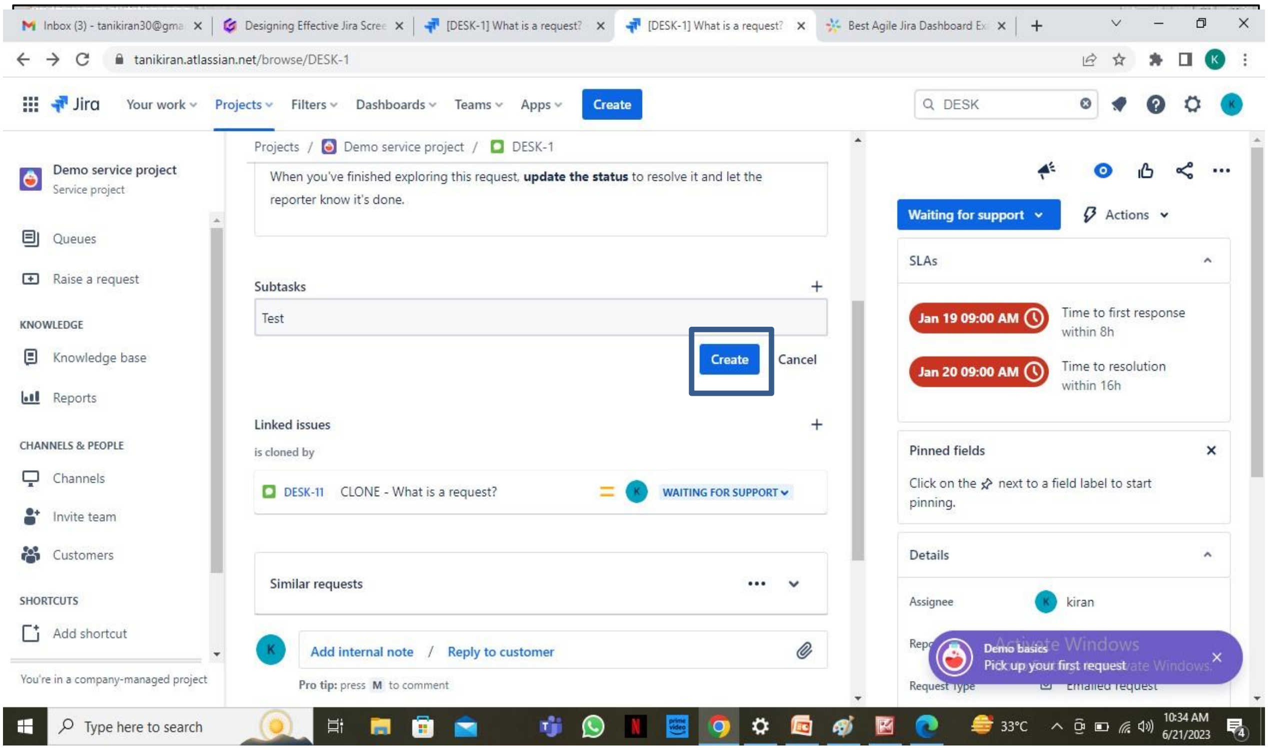
We should consider the following steps when creating a subtask.

- Open an issue where subtasks should be created.
- Select More → Create Subtask. Create subtask page will display.

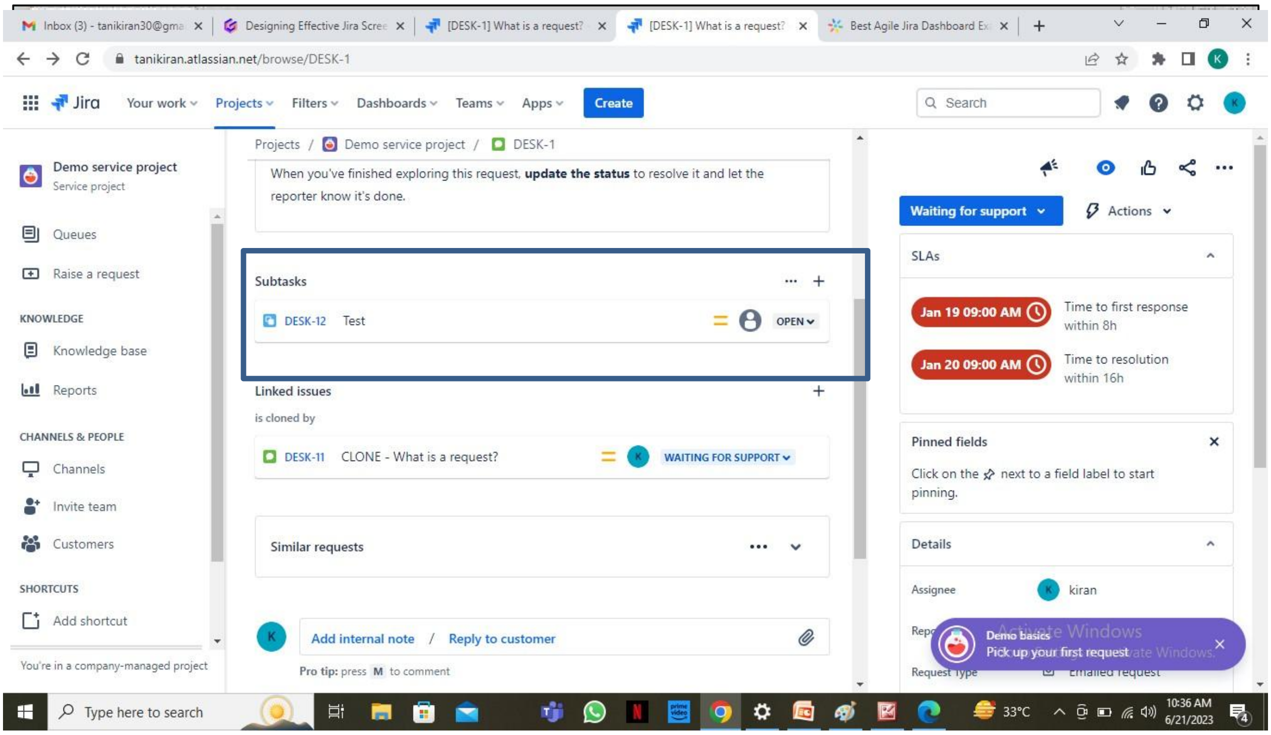
The following screenshot shows how to access the Create Subtask functionality.



Enter the details in all the required fields and then click on Create. The following screenshot shows the **Create Subtask Form** with the required and optional fields.



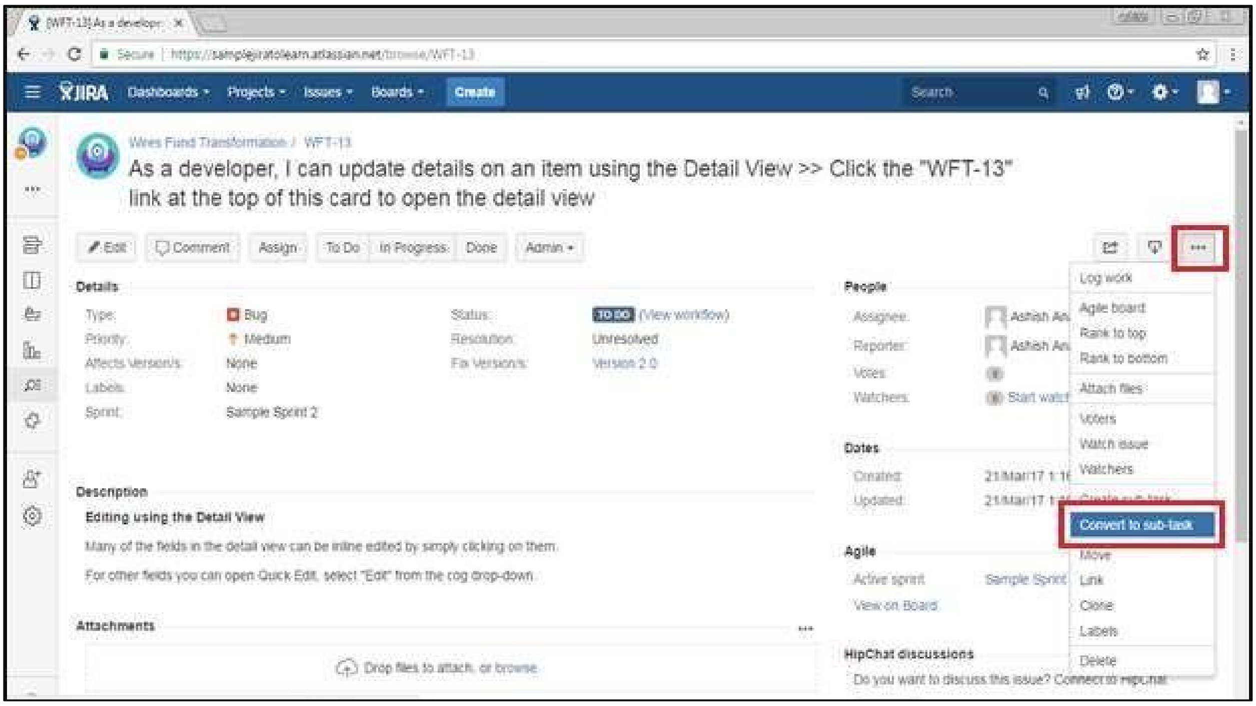
Once a subtask is created, it will be available on the Main Issue page → Subtask section. The following screenshot shows how to view a subtask in an issue.



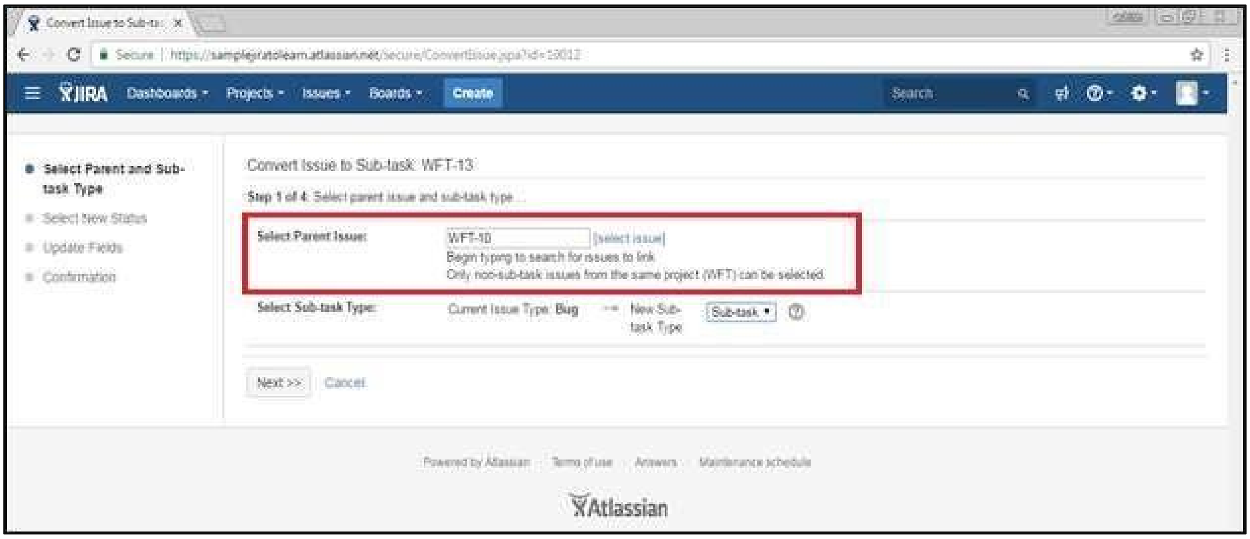
In this chapter, we will understand how to convert an issue to a subtask. For doing this, we should follow the procedure given below.

14. JIRA – Convert Issue to Subtask

To begin with, navigate and click to the issue, which needs to be converted into a subtask. Select More → Convert to subtask. The following screenshot shows how to navigate to convert to sub-task.



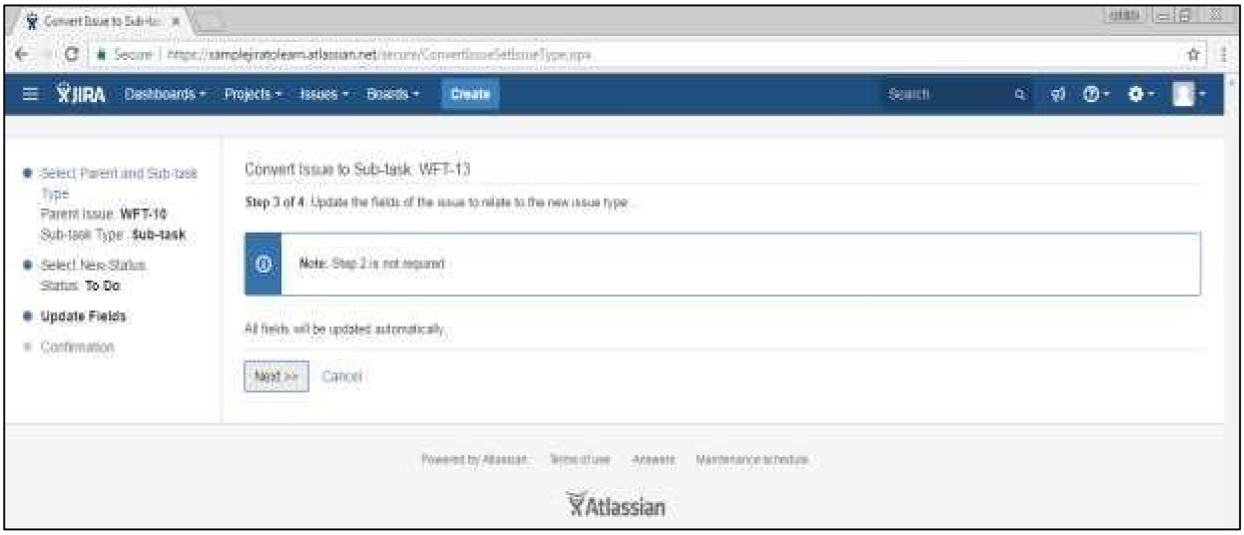
Choose the parent issue in which this subtask will be tagged. The following screenshot shows how to convert the issue into a sub-task.



Click on Next. If the status of the issue is not an allowed status for the new issue type. Select – New Status will be displayed. Select a new status and click on the Next button.

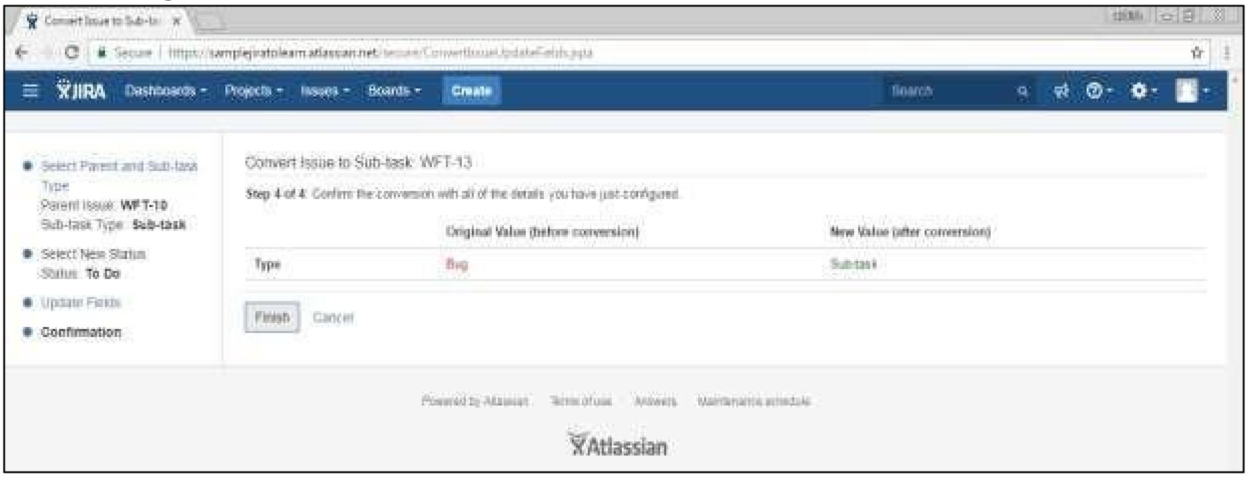
Update Fields screen will be prompted to enter any additional fields, if they are required. Otherwise, a message will be prompted as – 'All fields will be updated automatically'. Click on Next.

The following screenshot shows how to convert the issue in sub-tasks.

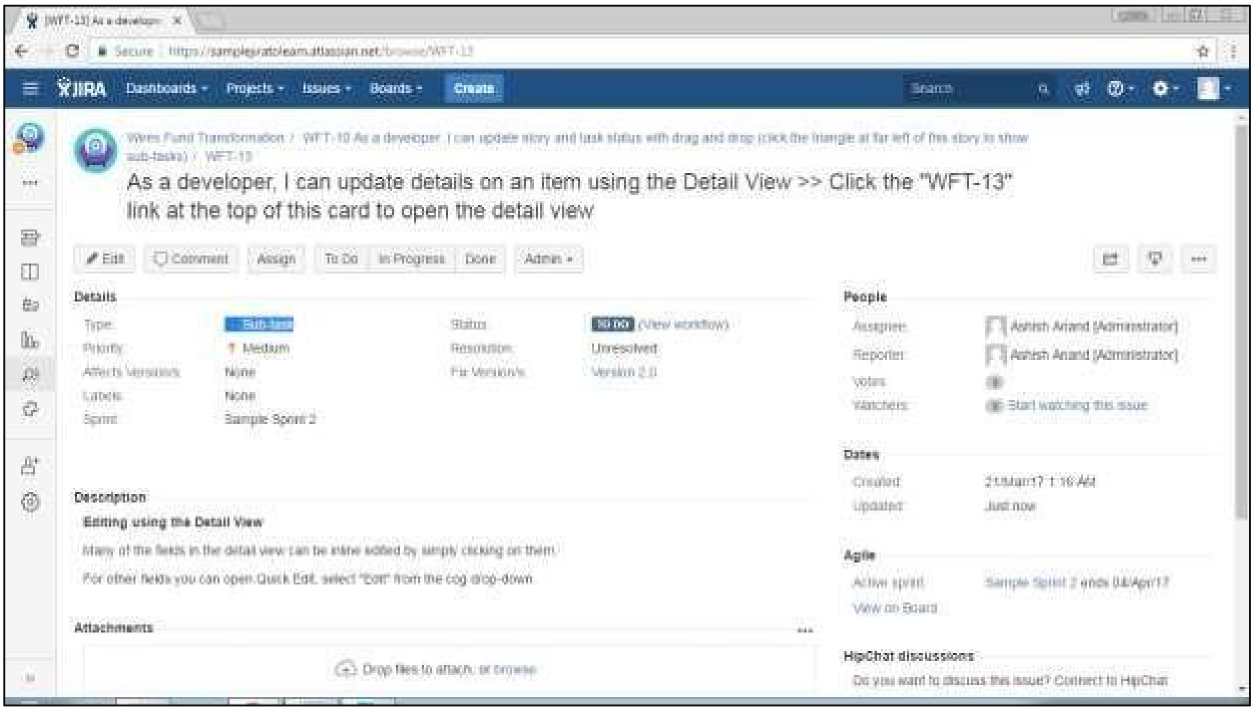


The Confirmation screen is displayed. It will display the original values and the new values. Click on Finish.

The following screenshot shows how to convert the issue in sub-tasks.



The original issue will be displayed. Now it is a sub-task. The parent's issue number is now displayed at the top of the screen. The following screenshot shows how the sub-task displays after successful conversion from an issue.



Convert an Issue to a Subtask

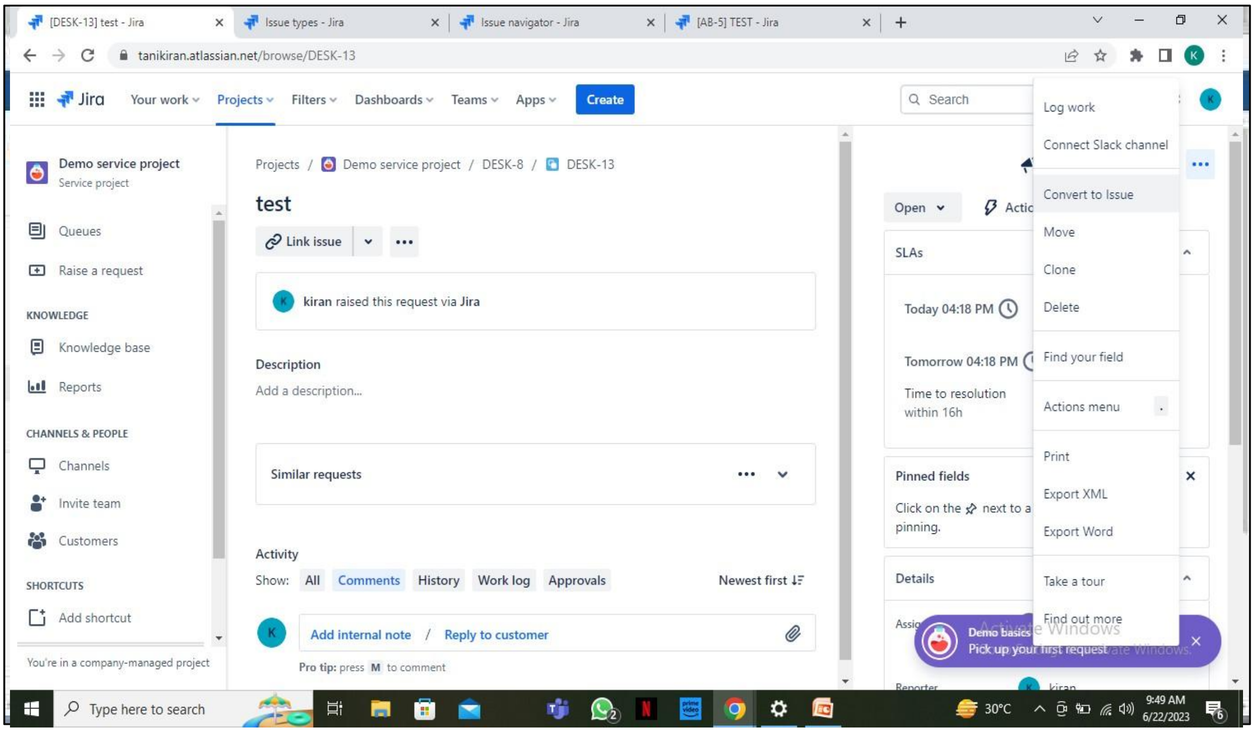
We should consider the following points while converting an issue to a subtask.

- An issue cannot be converted into a subtask if it has its own subtask.
- To convert such an issue into a subtask, we should first convert all the subtasks of issues into a standard issue and after that convert the issue into a subtask.
- Subtasks cannot be moved from one issue to another directly.
- To move a subtask from one issue to another, first convert all sub-tasks into issues and then again, convert issues to subtasks by giving the parent issue name while converting.

In the next chapter, we will learn how to covert a subtask to an issue.

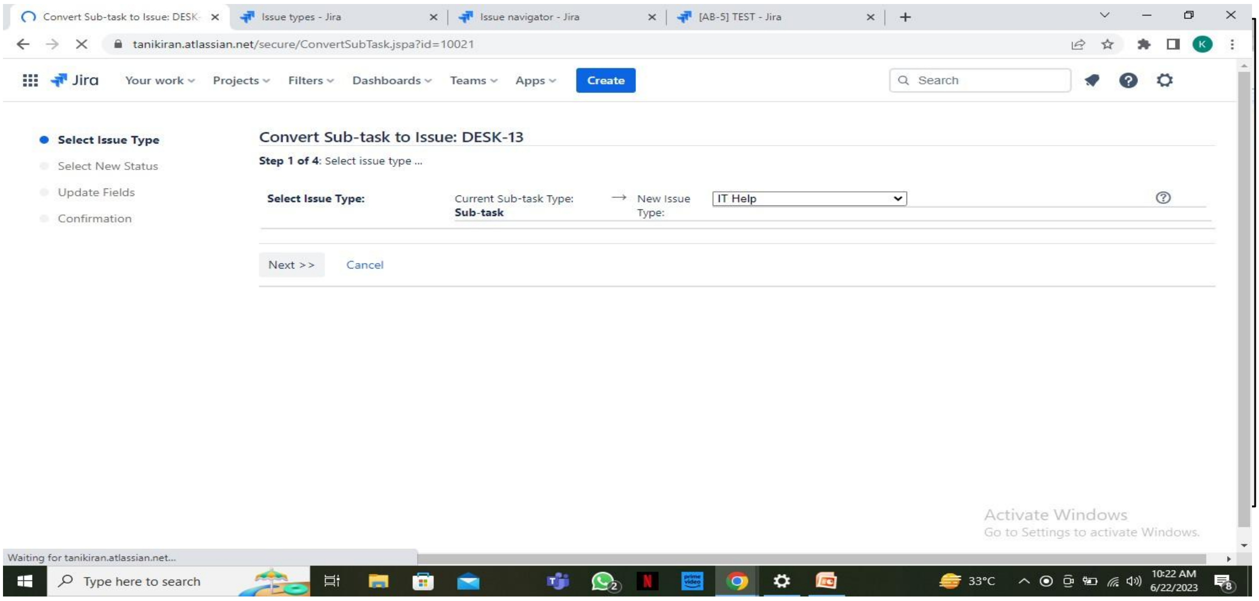
15. JIRA – Convert Subtask to Issue

To convert a subtask to an issue, we should first navigate to the subtask that needs to be converted into an issue. Then, Select More → Convert to issue. The following screenshot shows how to navigate at Convert to Issue.



To begin with, click on the drop down box of the Select Issue Type option, choose the type of the issue (i.e., a standard issue type) and click on the Next button.

The following screenshot shows how to convert a sub-task to an issue.

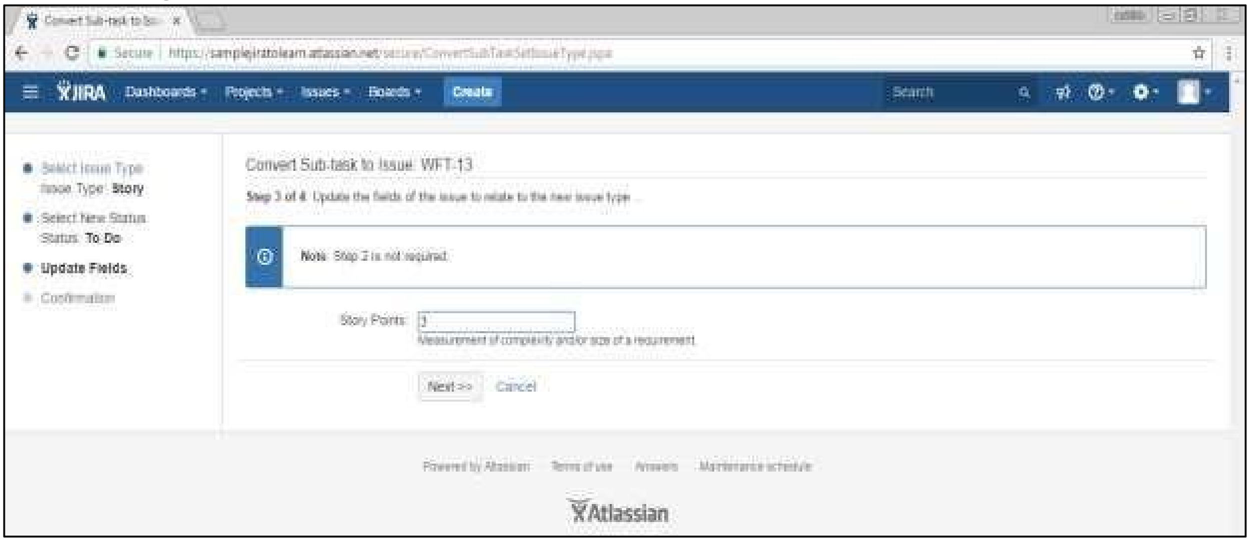


JIRA

If the status of the subtask is not an allowed status for the new issue type, then the **Select New Status** screen is displayed. Select a new status and click on the Next button.

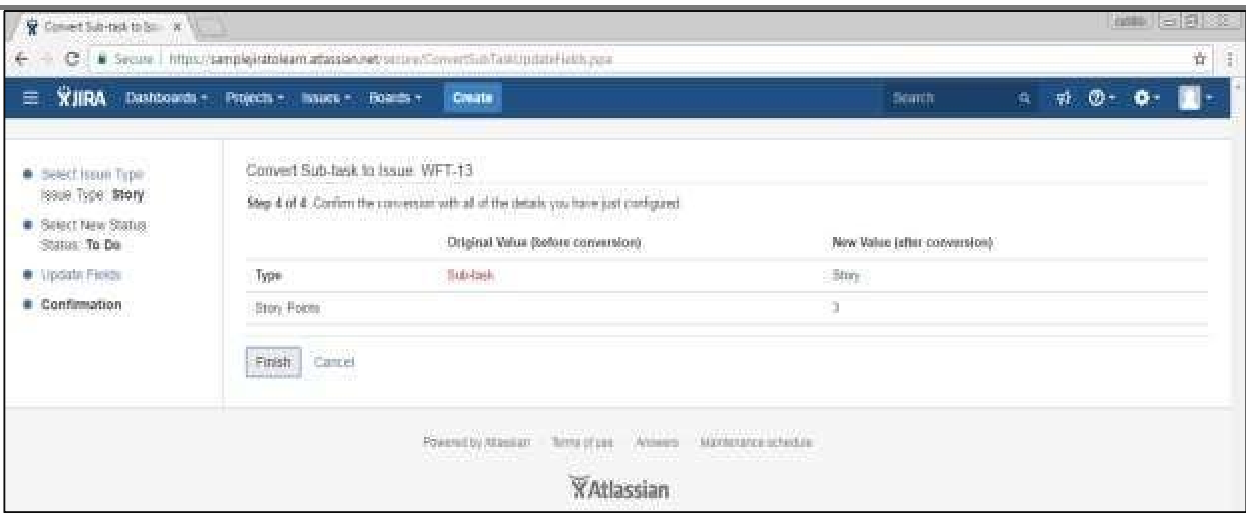
In the next step, the **Update Fields** screen will be prompted to enter any additional fields if they are required. Otherwise, a message will display stating – 'All fields will be updated automatically'. Click on **Next**.

The following screenshot shows how to convert a subtask in to an issue.



The **Confirmation** screen is displayed. It will display the original values and the new values. Click on **Finish**.

The following screenshot shows how to convert a subtask to an issue.



The issue will be displayed. It is no longer a subtask. There is no longer a parent issue number displayed at the top of the screen.

The following shows how the issue will display after conversion from a subtask.