

How To - Jira - Screen Definitions

Screens in JIRA

A Screen is a defined collection of fields that appear when an issue is created, edited or viewed in JIRA.

It gives you control over the information you want included in your Issue, depending on what type of Issue you are creating or editing. For example, when I create an issue for my support team, I would want different information in the ticket than if I were to create a user story for the development team.

It is a best practice to create three copies of each Screen for each Issue type:

One for creating the Issue, one for editing and one for viewing.

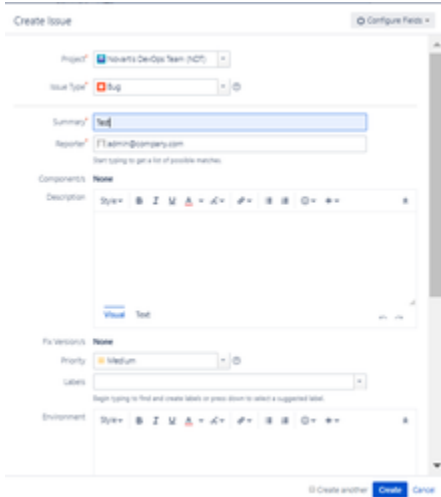
To create a Screen in JIRA:

1. Navigate to the Issues Administration page and select Screens from the left sidebar.
2. "Add Screen"
3. Name your Screen and write a description - The name should be descriptive and say exactly what this Screen is intended for, e.g. "Create Support Issue Screen" or "Edit Bug Issue Screen". The description should include any additional information, like what project the Screen is used for.
4. Add fields to your Screen - The Summary field is the only required field,

Like mentioned in step four that the Summary field is the only field that is required and that you should try to keep the number of fields down to a minimum. You will still be able to create a Screen without the summary field, but you won't be able to use that Screen to create Issues.

- Summary
- Description
- Reporter
- Assignee
- Time Tracking

The resulting Screen would then look like this (note that the Project and Issue Type fields are a system default):

The screenshot shows the 'Create Issue' form in Jira. At the top, there's a 'Configure Fields' button. Below it, the 'Project' is set to 'Support DevOps Team (SDT)' and 'Issue Type' is 'Bug'. The 'Summary' field contains the text 'Test'. The 'Reporter' field is populated with 'f1admm@company.com'. Below the reporter field, there's a section for 'Components' with a table showing 'Name' and 'Description'. The 'Priority' is set to 'Medium'. The 'Labels' field is empty. The 'Environment' field is also empty. At the bottom, there are buttons for 'Create another', 'Create', and 'Cancel'.

Screen Scheme in JIRA

A Screen Scheme in JIRA allows you to associate certain Screens with Issue Operations.

There are three operations that you can link to: *Create*, *Edit* and *View*. Here, you link the three screens you created previously to their respective operations.

1. Navigate to the Issues Administration Page and select Screen Schemes from the left sidebar.
2. "Add Screen Scheme"
3. Name your Screen and write a description and choose a Default Screen.
4. Associate an Issue Operation with a Screen

The Screen Scheme should look something like this when you've associated Issue Operations with respective Screens:

Configure Screen Scheme — Bug Screen Scheme

i Please use the table and the form below to select which screen will be used for each issue operation that does not have a specific mapping in this scheme.

To activate this screen scheme, map it to one or more issue types using the "Issue Type Screen Scheme" configuration page.

Note: a screen scheme can only be deleted if it is not a default scheme.

- [View all screen schemes](#)

Issue Operation	Screen
Default Used for all unmapped operations.	Create Bug Issue Screen
Create Issue	Create Bug Issue Screen
Edit Issue	Edit Bug Issue Screen
View Issue	View Bug Issue Screen

Issue Type Screen Scheme

[The Issue Type Screen Scheme](#) is where it all comes together. It enables you to associate a Screen Scheme with an Issue Type within a Project.

Here's an example in JIRA:

A development Project uses two Issue Types: "Bug" and "User Story." The "Development Issue Type Screen Scheme" associates two different Screen Schemes to the Issue Types:

Issue Type: "Bug"

- Bug Screen Scheme:
 - Create Issue Screen (Create Bug Issue Screen)
 - Edit Issue (Edit Bug Issue Screen)
 - View Issue (View Bug Issue Screen)

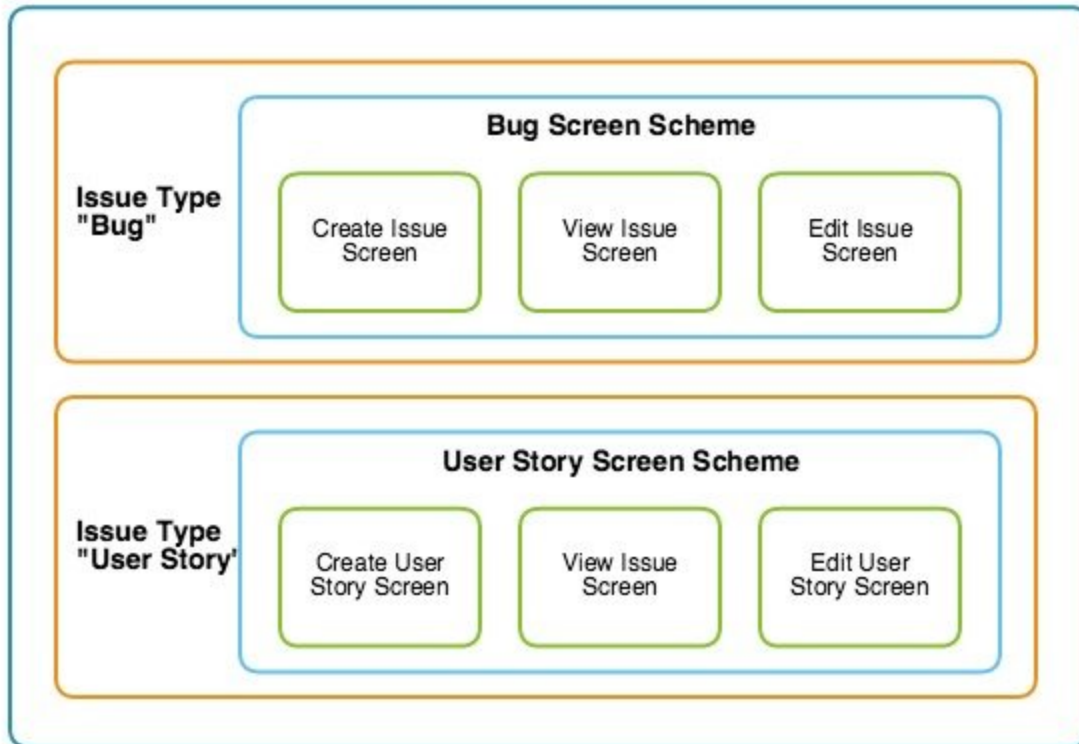
Issue Type: "User Story"

- User Story Screen Scheme:
 - Create Issue Screen (Create User Story Screen)
 - Edit Issue Screen (Edit User Story Screen)
 - View Issue Screen (View User Story Screen)

This hierarchy is explained visually in the graph below:

JIRA Project

Development Issue Type Screen Scheme



Workflow Screens

[Workflow Screens](#) are exactly the same as the Issue Screens, except that they are not used in Screen Schemes. Instead of associating a screen with an Issue Operation, the Screen used is a workflow transition.


That way, you can make a screen appear when an issue transitions between workflow statuses. This feature makes the workflow engine even more powerful. The ability to add information to the issue as it travels through its workflow is valuable.


An example of a Workflow Screen is the Resolve Issue Screen (which appears in the Default JIRA workflow). The Resolve Issue Screen appears when an Issue is *Resolved* in its workflow, and includes fields that are important at that point, like *Resolution*.

It is a best practice to create separate screens for Workflow Screens and Issue Screens.

Adding a screen


To add a new screen to Jira:

1. Log in as a user with the **Jira Administrators** [global permission](#).
2. Choose  > **Issues**. Select **Screens** to open the View Screens page, which lists all screens that have been defined in JIRA.
3. Click the **Add New Screen** button to open the **Add New Screen** dialog box.
4. Complete the **Add New Screen** dialog box:
 - **Name** — enter a short phrase that best describes your new screen.
 - **Description** — enter a sentence or two to describe the situations screen will be used.
5. Click the **Add** button to add your new screen to Jira.


 You will be taken directly to the **Configure Screen** page, where you can add fields to your new screen. See the [Configuring a screen's fields](#) section below for details.

Editing a screen's details


To change a screen's name and/or description:


1. Log in as a user with the **Jira Administrators** [global permission](#).
2. Choose  > **Issues**. Select **Screens** to open the View Screens page, which lists all screens that have been defined in JIRA.
3. Click the **Edit** link next to the appropriate screen.
4. You will now be directed to the **Edit Screen** page where you can edit the name and/or description of the Screen.

Copying a screen

1. Log in as a user with the **Jira Administrators** [global permission](#).
2. Choose  > **Issues**. Select **Screens** to open the View Screens page, which lists all screens that have been defined in JIRA.
3. Click the **Copy** link next to the Screen you wish to copy. You will be directed to the **Copy Screen** page, where you can enter a name and a description for the new Screen.

Deleting a screen

1. Log in as a user with the **Jira Administrators** [global permission](#).
2. Choose  > **Issues**. Select **Screens** to open the View Screens page, which lists all screens that have been defined in JIRA.
3. Click the **Delete** link next to the screen you wish to delete. You will be prompted to confirm your deletion

 Screens that are associated with one or more screen schemes, or one or more workflow transitions, cannot be deleted.

Activating a screen


To make a Screen available to users, you can **either**:

- Associate the Screen with an **issue operation** (e.g. 'Create Issue'), via a **Screen Scheme**
- Associate the Screen with a **Workflow Transition** (e.g. 'Resolve Issue')

Configuring a screen's tabs and fields

You can configure the fields that display on a particular screen by adding/removing fields, as well as reordering them. Tabs can also be used to help group related fields. Tabs are useful for organizing complex screens, as you can place less used fields onto separate tabs. You can also add, remove and reorder tabs, as well as rename them.

To configure a screen's tabs and fields:

1. Log in as a user with the **Jira Administrators** [global permission](#).
2. Choose  > **Issues**. Select **Screens** to open the View Screens page, which lists all screens that have been defined in JIRA.
3. Click the **Configure** link next to the screen you want to add a field to. You can perform the following operations:

Operation	Instructions
Add a tab	Click Add Tab . Enter the name of the new tab in the dialog that appears and click Add .
Move a tab	Hover over the dotted part of the tab (next to the tab name) and drag the tab to the desired position.
Rename a tab	1. Hover over the tab name and click the pencil icon . 2. Enter the new name and click OK .
Delete a tab	Hover over the tab name and click the X .
Add a field	1. Click the tab that you want to add the field to. 2. Type the name of the field in the drop-down displayed at the bottom of the current fields. Field suggestions will appear as you type. 3. Click Add Field to add it to the current tab.

Move a field	Hover over the dotted part of the field (next to the field name) and drag the field to the desired position. Move a field to a different tab by dragging it to the name of the tab and dropping it.
Delete a field	Hover over the field and click the Delete button that appears.