Jira Configuring Screens

One thing that is often overlooked when configuring JIRA is Screens and Screen Schemes and how they connect to your Issues and Projects. In this blog, we'll cover the setup and our suggested best practices for Screens and Screen schemes in JIRA and how to associate them with Issue Types.

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.

One reason for this is, for example, when you create an Issue, you only need a few required fields, but you may want to add more later when work has started on the Issue. The Create Issue screen would then only include those few required fields and the Edit Issue Screen would include more fields. This also has to do with the Screen Scheme, which we cover below.

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, but that's hardly enough for any Issue. It's best practice to keep the number of fields to the bare minimum to make issue creation simpler (e.g. if you are not using versions in your project, you can leave out the Versions 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.
That being said, we'd like to name a few fields that we find really useful (and necessary most of the time!).

- 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):

Create Issue

Project * DevOps Platform ▾

Issue Type * 🔘 Bug ▾ ⑦

Summary * This is the only required field!

Description

Assignee 👤 Automatic ▾

Assign to me

Reporter * 👤 Bavada, Divyanand

Start typing to get a list of possible matches.

Original Estimate (eg. 3w 4d 12h) ⑦

The original estimate of how much work is involved in resolving this issue.

Remaining Estimate (eg. 3w 4d 12h) ⑦

An estimate of how much work remains until this issue will be resolved.

☐ Create another **Create** 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: Cr*eate*, *Edit* and V*iew*. Here, you link the three screens you created previously to

their respective operations. This may seem like extra work at first, but later when you want to add or remove fields to any one of your screens, you can edit each screen without affecting the others.
To create a Screen Scheme:

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 operations that do not have a specific mapping in this scheme.
>
> To activate this screen scheme, map it to one or more issue types usin;
>
> 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

Press the period button (".") at any time in JIRA to open the quick navigation dialog. Start typing the name of the page you are looking for and open it by pressing the Return key.

A Screen Scheme is not associated to a JIRA Project directly, but via the Issue Type Screen Scheme, which is associated to a Project in JIRA.

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)
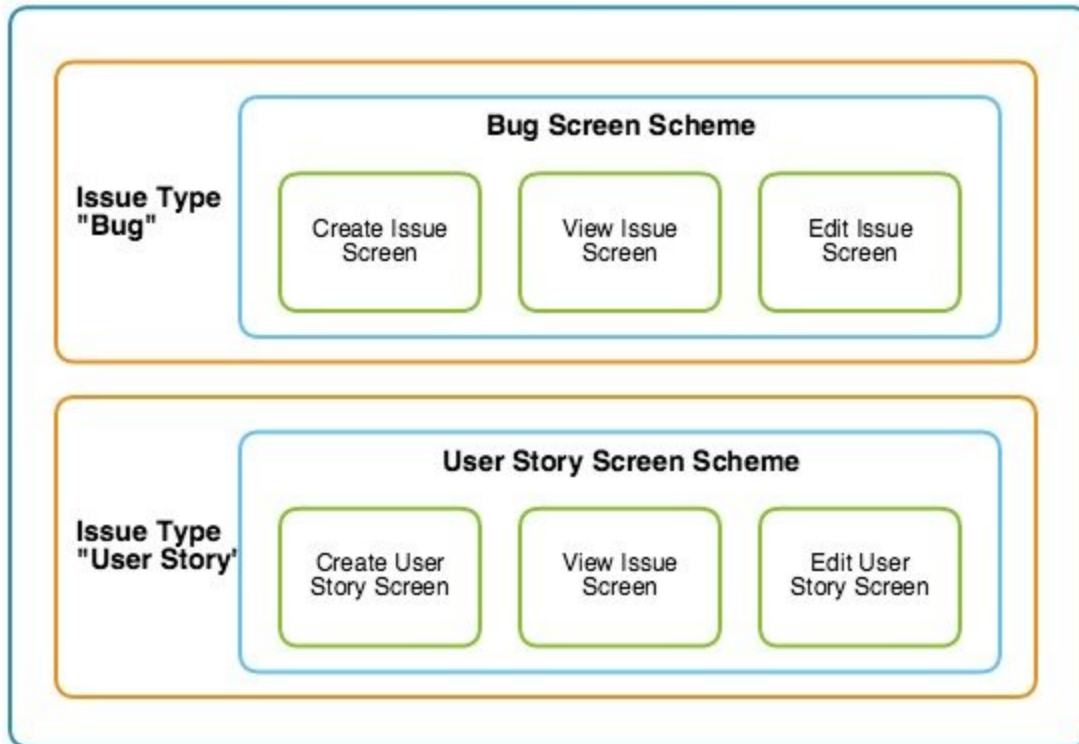   - View Issue (View Bug Issue Screen)

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:

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.

A workflow Screen does not require the **Summary** field, and it can in fact have no fields. When you create a blank Screen and use it in a workflow, it will appear with only a *Comment* field.

You can also configure your workflow to set a default value to a field when it transitions but we'll cover that and advanced workflow configurations in a later blog.