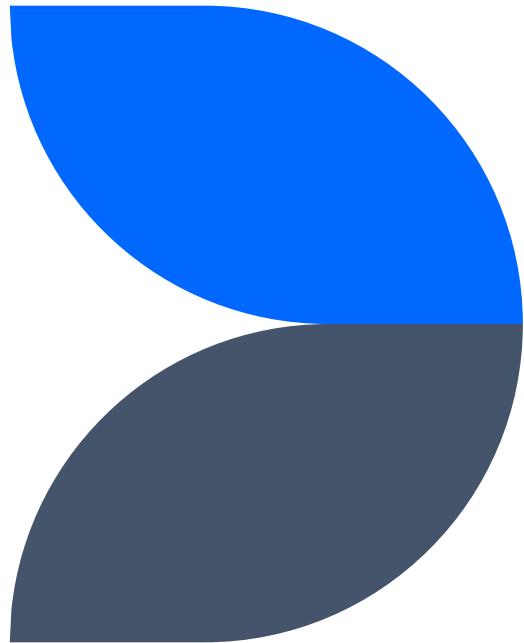


Lab 10: **Custom Workflows** **and Transition Rules**

CSE233 Agile Software Engineering





What Is a Workflow in Jira?

A workflow defines the lifecycle of an issue.

A workflow consists of:

Statuses

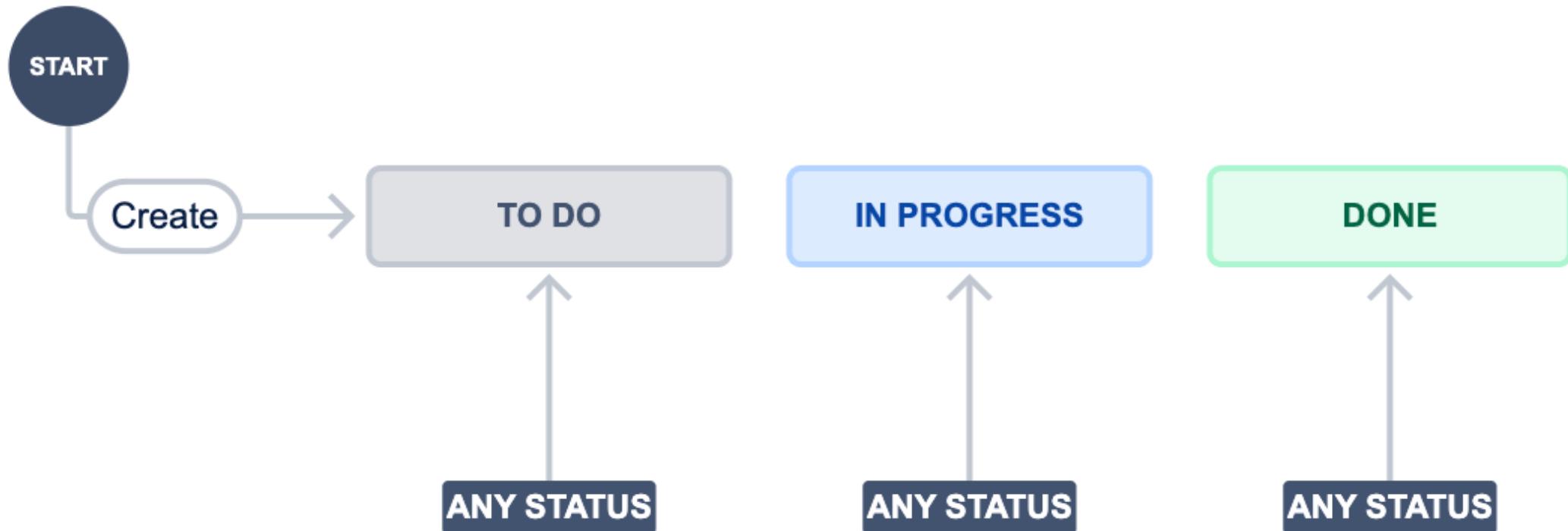
Represent the state of an issue (To Do, In Progress, Done...)

Transitions

How an issue moves between statuses

Rules

Conditions, validators, and post-functions



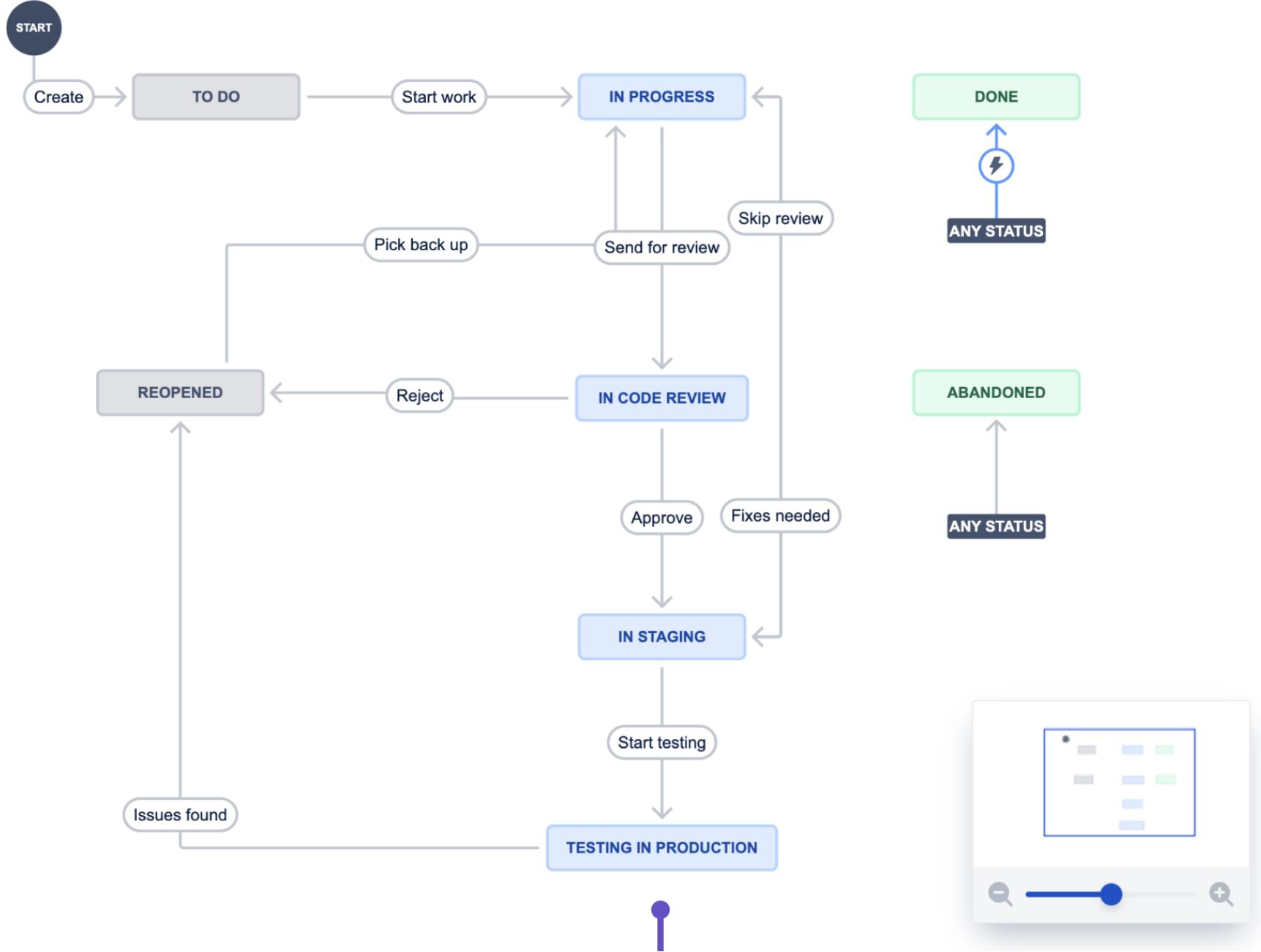
Why Customize Workflows?

Default workflow is very simple:

To Do → **In Progress** → **Done**

Teams often need:

- QA verification
- Blocking states
- Approval flows
- Automation on transitions



Status

Statuses represent the different steps of your process.

Each status has:

- **Name**
- **Category** (To Do / In Progress / Done)
- **Meaning for reporting**
(Category affects burn-down charts, cycle time, etc.)

To Do

Work not yet started.

In Progress

Work currently being executed.

Done

Completed work, contributes to velocity.

Transitions

Transitions define **how an issue changes status**.

Each transition has:

- Name (Start work, Move to review)
- Rules (restrictions, validations, actions)

Rules

There are three rule types in Jira Workflows:

1. Restrict Transition (previously Conditions)

Control *who* can execute a transition.

2. Validate Details (previously Validators)

Control *what must be true* before transitioning.

3. Perform Actions (previously Post-Functions)

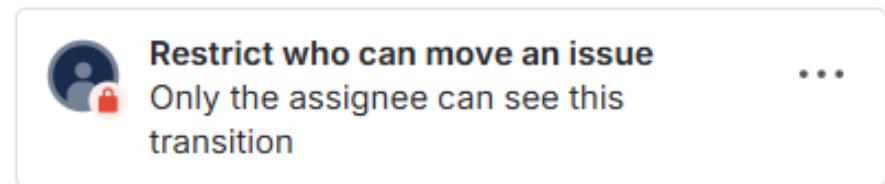
Execute *automated actions* after transition.

Restrict Transition

A **restrict transition** rule decides who is allowed to perform a transition.

Examples:

- Only the assignee can move issue
- Only users in Developers group
- Only Reporter



Purpose:

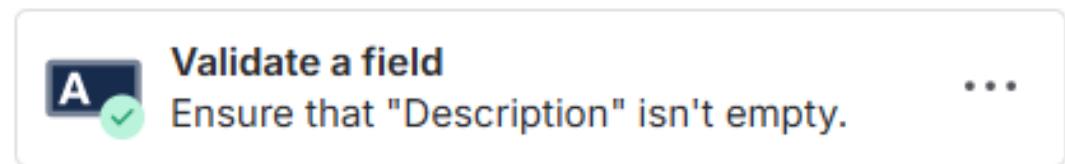
Prevent unauthorized or accidental transitions.

Validate Details

A **validate details** rule checks whether the issue meets requirements before moving.

Examples:

- Description must not be empty
- Issue must have a fix version
- Resolution must be set
- Field must be numeric or non-empty



Purpose:

Avoid bad tickets moving through the system.

Perform Actions

A **perform-actions** rule is executed *after* the transition happens.

Example:

- Set fields automatically (labels, priority, dates, etc.)
- Assign the issue
- Fire an event (notifications)
- Update status/category



Purpose:

Automate repetitive tasks and maintain consistency.

Examples of Custom Workflows

Software Development

To Do → In Progress → Code Review → QA → Done

IT Service Desk

New → Assigned → In Progress → Awaiting Customer → Resolved → Closed

Content Creation

Idea → Draft → Review → Ready → Published

Each team molds Jira to its own process.

Boards VS Workflows

Boards VS Workflows

A board is essentially:

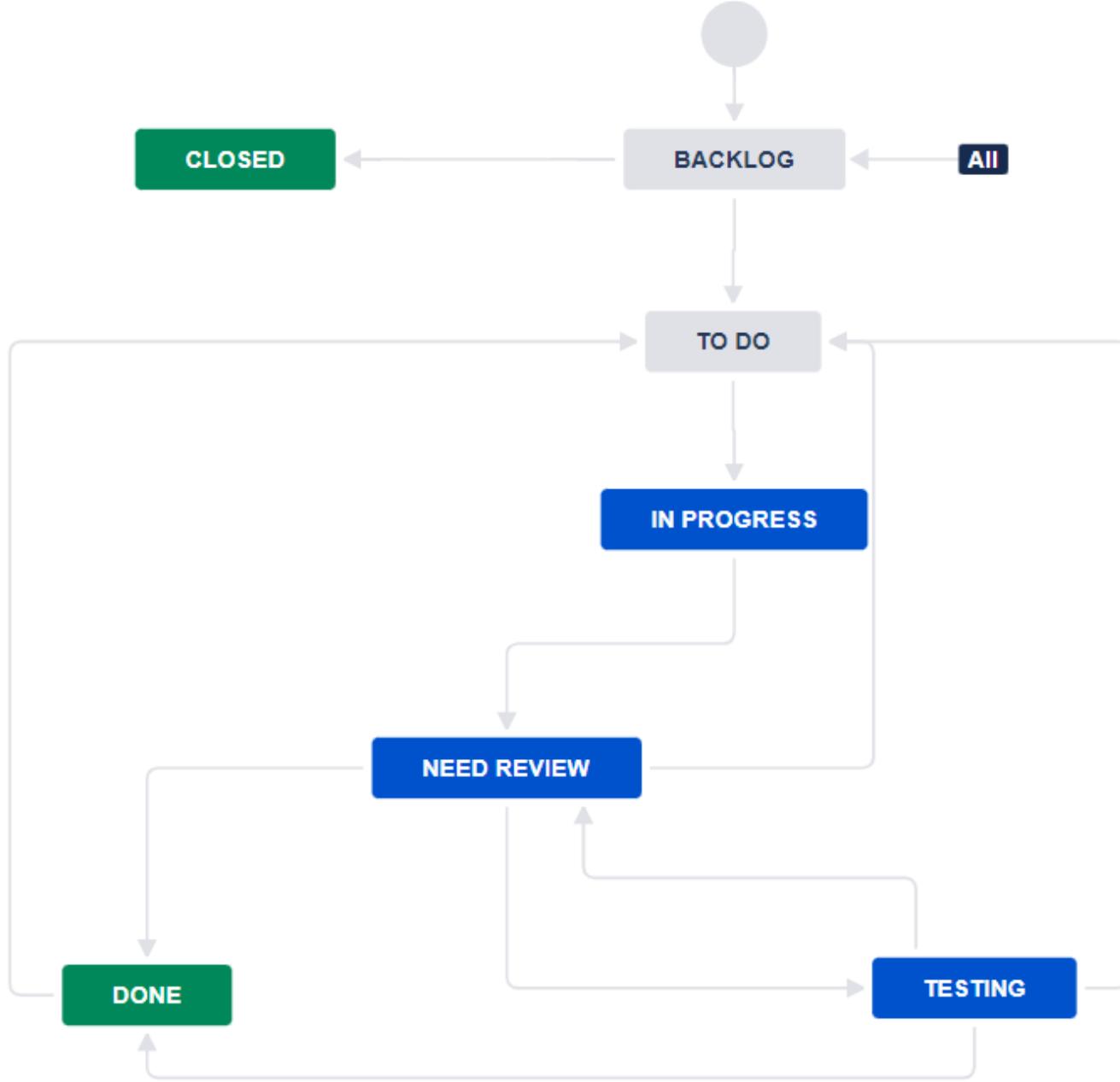
- A **visual layout of statuses** grouped into **columns**
- Powered by the project's **workflow**

This means:

If the workflow changes → the board changes

If statuses are added/removed → columns must be updated

If statuses are unmapped → issues become invisible



 Beyond Gravity
Software project

PLANNING

Roadmap

Backlog

Board

Reports

Issues

DEVELOPMENT

Code

Security

Releases

Project Pages

Add shortcut

Project settings

You're in a team-managed project

Learn more

Projects / Beyond Gravity

Board



+3

Epic

Type

GROUP BY

None

Insights

TO DO 6

Optimize experience for mobile web

BILLING



Onboard workout options (OWO)

ACCOUNTS



Multi-dest search UI mobileweb

ACCOUNTS



Billing system integration - frontend

FORMS



Account settings defaults

ACCOUNTS



IN PROGRESS 6

Fast trip search

ACCOUNTS



Affiliate links integration - frontend

BILLING



Quick booking for accommodations - website

FORMS



Adapt web app no new payments provider

FORMS



Fluid booking on tablets

FEEDBACK



IN REVIEW 6

Revise and streamline booking flow

ACCOUNTS



Travel suggestion experiments

ACCOUNTS



BG product search bug

ACCOUNTS



Color of pale yellow on our pages looks incorrect

FEEDBACK



Ongoing customer satisfaction

ACCOUNTS



DONE ✓ 6

Customers reporting shopping cart purchasing issues with the BG web store

ACCOUNTS



Shopping cart purchasing issues with the BG web store

ACCOUNTS



BugFix BG Web-store app crashing

FORMS



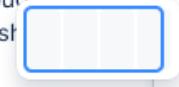
Software bug fix for BG Web-store app crashing

FEEDBACK



High outage: Software bug - BG Web-store app crash

BILLING



Board Columns

Each board column corresponds to **one or more workflow statuses**.

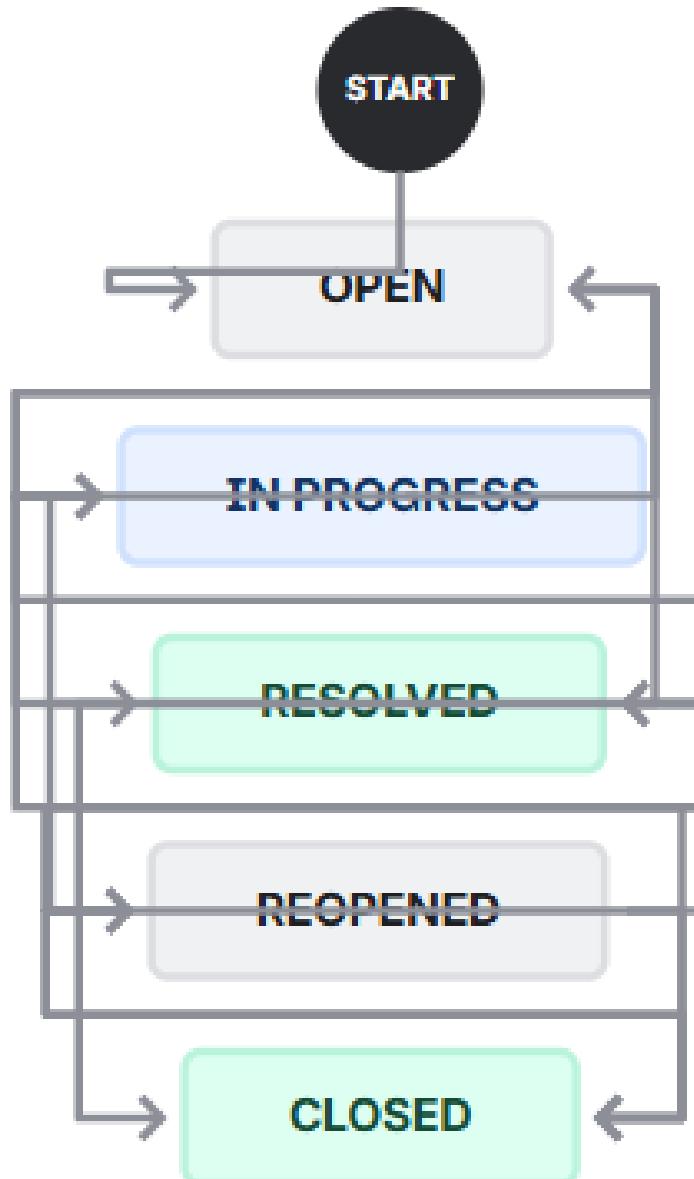
Example column → statuses:

In Progress Column

Contains → In Progress, Implementing, Reviewing

Done Column

Contains → Done, Closed, Released (all Done category)



TO DO

OPEN
1 work item

REOPENED
1 work item

IN PROGRESS

IN PROGRESS
0 work items

DONE

RESOLVED
1 work item



2 statuses
in one column

TO DO



OPEN

1 work item

REOPENED

1 work item

IN PROGRESS



IN PROGRESS

0 work items

DONE



RESOLVED

1 work item



Closed??

Unmapped Statuses

When a workflow is modified (new status added):

The new status appears under “**Unmapped Statuses**” in Board Settings.

Map statuses to columns i

Unmapped statuses

Work items with these statuses won't be visible.

No work items

CLOSED

0 work items

TO DO



OPEN

1 work item

REOPENED

1 work item

IN PROGRESS



IN PROGRESS

0 work items

DONE



RESOLVED

1 work item



Board Does Not Define the Workflow

Common misconception: “Changing columns changes the workflow.”

Boards are only a *visualization*.

Workflow is defined in: **Project Settings → Workflows**

Board is defined in: **Board Settings → Columns**

Changing the board does NOT:

- ✗ Add a status to workflow
- ✗ Add transitions
- ✗ Change rules

It only changes how statuses are displayed.

Thank you

Eng. Abdelrahman Salah