



Lab 10: Custom Workflows and Transition Rules

Note: Steps are done on a Company-managed project. For Team-managed projects, steps are slightly different.

Exercise 1: Create a Custom Workflow

1. Go to **Space Settings** → **Workflows**
Team-managed: **Space Settings** → **Board** → **Columns and statuses** → **Manage Workflow**
2. Click **Edit Workflow**.
3. The default statuses are To Do, In Progress, Done
 - Add a new status called **In Review** with status type **In Progress**
4. Add transitions.
 - **In progress** → **In Review**
 - **In Review** → **Done**
5. Delete the **Any Transition** above Done Status
6. Update Workflow and Go Back to Board
7. Now try to move an issue from To Do to Done directly it will reject the transition
8. Notice that Testing column hasn't been added to the board yet

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Screenshot of created custom workflow



Exercise 2: Add new column

1. Go to **Board settings** → **Layout** → **Columns**
2. Create a **new column** named **In Review** (or anything you want)
3. Drag the **In Review** status from unmapped statuses to the new column
4. Go back to Board
5. You can now see the testing column working as expected

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Screenshot of created column with status added

Exercise 3: Add a Transition Rule (Restriction Transition)

1. Go to **Space Settings** → **Workflows** → **Edit Workflow**.
2. Select the transition **In Progress** → **In Review**.
3. Search for rule: **Restrict who can move an issue**
4. Choose Restrict to **Users** → **work item's assignee**
5. Add rule and update workflow
6. Test the rule by trying to move an issue you are not assigned to from In Progress to In Review

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Screenshot of created rule



Exercise 4: Add a Transition Rule (Validate Details)

1. Go to **Space Settings** → **Workflows** → **Edit Workflow**.
2. Select the transition **In Progress** → **In Review**.
3. Search for rule: **Validate a field**
4. Choose isn't empty and then description field
5. Add rule and update workflow
6. Test the rule by trying to move an issue that does not have a description.

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Screenshot of created rule

Exercise 5: Add a Transition Rule (Perform Actions)

1. Go to **Space Settings** → **Workflows** → **Edit Workflow**.
2. Select the transition **In Review** → **Done**.
3. Search for rule: **Update an Issue Field**
4. Choose Labels and add a new label named "Finished"
5. Add rule and update workflow
6. Test the rule by trying to move an issue to Done and check labels field

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Screenshot of created rule