

Get started with automation rules

While JWT [workflow post functions](#) are a perfect way to automate actions that are directly tied to a **workflow transition**, automation rules allow you to automate actions within Jira regardless of any workflow.

JWT automation rules contain up to **four elements**:



Triggers: They define **when** a rule should be executed. This is why every rule starts with a trigger. Usually a trigger listens to a field, issue, project or system event, but it can also be **scheduled** to only be executed at certain times. [Learn more about triggers](#).



Selectors: They act like **filters** that provides the ability to search for specific issues within a **rule** and then take **actions** only against those issues found. [Learn more about selectors](#).



Conditions: They provide the ability to further **refine** and control processing. You can configure complex **rules** containing **multiple** and/or **nested** conditions. [Learn more about conditions](#).



Actions: They define any **field**, **issue**, **transition**, **comment** or **email processing** that should take place automatically. [Learn more about actions](#).

A real-word example...

The minimum effort: A trigger + 1 action



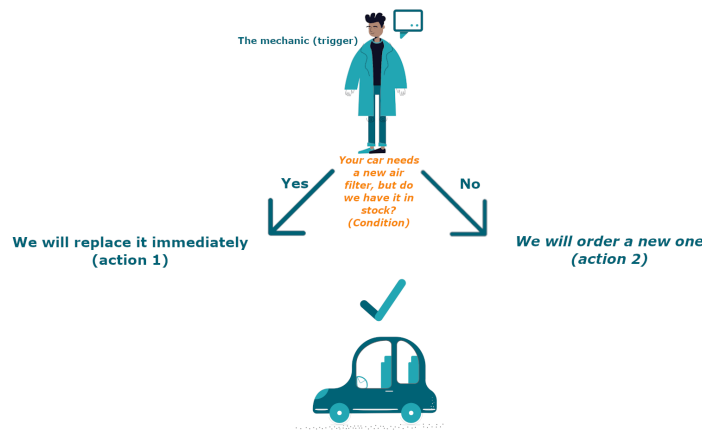
Your car broke down, so you call the repair shop (trigger). Then, the mechanic will take care of it (action).

So first of all, let us discuss the first steps of the rule built in this example; they consist of a **trigger** and an **action**.

You found the signal so you quickly called the nearest repair shop (this is your **trigger** in this case), then the mechanic comes and take it to the shop to take care of the rest (and here is the **action**).

That's it, these were the two main elements of a rule.

Getting more control: Adding a condition



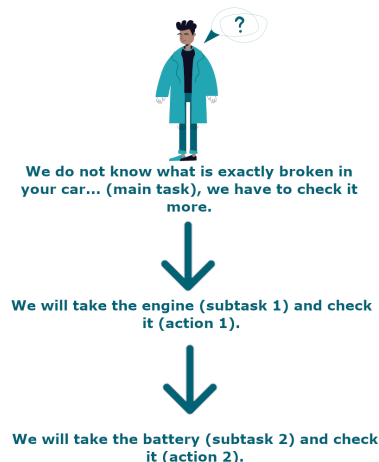
Now, the car is in the repair shop, let us imagine two scenarios, the first one is where the mechanic knows exactly what is wrong with your car, and the second one where he does not know what is broken in your car.

Let us start with the first one.

The mechanic says that your car needs a new air filter, but he does not know if they have it in stock at the shop (this is the **condition**), he will go and check, if they have it (**yes** = condition is fulfilled), then he would just replace it (**action1**) and your car is good to go! If the do not have it (**no** = condition is not fulfilled), then he will order one and replace it (**action 2**) and your car is good to go!

This is an example of having a rule with **trigger condition**(if condition is **met**) **action 1**(if condition is **not met**) **action 2**

Enabling the full power: Using selectors



In the second scenario, like we mentioned before, the mechanic does not know what is wrong with your car (this is the **main task**), so he will take parts of your car (consider them as **subtasks**).

1. The mechanic takes the engine (**subtask 1**) and check it (**action 1**).
2. The mechanics takes the battery (**subtask 2**) and check it (**action 2**). and so on...

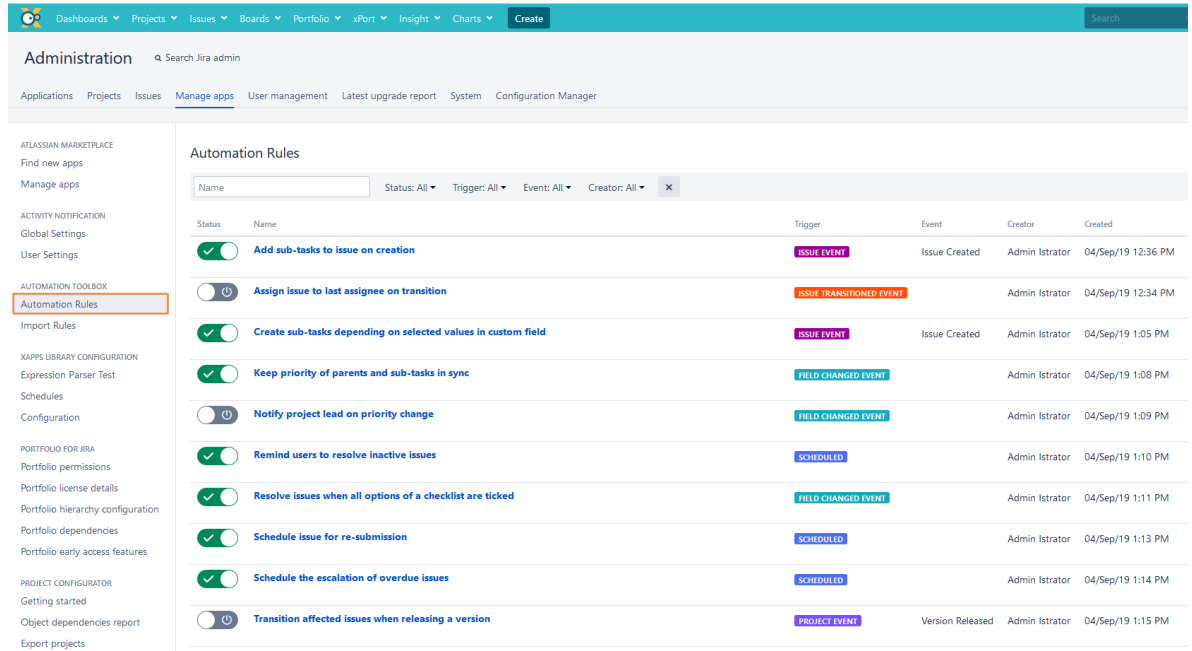
This is a example of a rule with a **trigger** and **selector**.

First steps

1

Browse to the **rule navigator**.

After installing JWT you will find all automation rules here: **Administration Manage apps Automation rules**



The screenshot shows the Jira Administration interface. The top navigation bar includes links for Dashboards, Projects, Issues, Boards, Portfolio, xPort, Insight, Charts, and a Create button. Below this is the Administration section with a search bar and a list of sub-sections: Applications, Projects, Issues, Manage apps (selected), User management, Latest upgrade report, System, and Configuration Manager. The left sidebar contains various configuration options, with 'Automation Rules' highlighted under the 'AUTOMATION TOOLBOX' section. The main content area displays a table of Automation Rules.

| Status | Name | Trigger | Event | Creator | Created |
|-------------------------------------|---|--------------------------|------------------|----------------|--------------------|
| <input checked="" type="checkbox"/> | Add sub-tasks to issue on creation | ISSUE EVENT | Issue Created | Admin Istrator | 04/Sep/19 12:36 PM |
| <input type="checkbox"/> | Assign issue to last assignee on transition | ISSUE TRANSITIONED EVENT | | Admin Istrator | 04/Sep/19 12:34 PM |
| <input checked="" type="checkbox"/> | Create sub-tasks depending on selected values in custom field | ISSUE EVENT | Issue Created | Admin Istrator | 04/Sep/19 1:05 PM |
| <input checked="" type="checkbox"/> | Keep priority of parents and sub-tasks in sync | FIELD CHANGED EVENT | | Admin Istrator | 04/Sep/19 1:08 PM |
| <input type="checkbox"/> | Notify project lead on priority change | FIELD CHANGED EVENT | | Admin Istrator | 04/Sep/19 1:09 PM |
| <input checked="" type="checkbox"/> | Remind users to resolve inactive issues | SCHEDULED | | Admin Istrator | 04/Sep/19 1:10 PM |
| <input checked="" type="checkbox"/> | Resolve issues when all options of a checklist are ticked | FIELD CHANGED EVENT | | Admin Istrator | 04/Sep/19 1:11 PM |
| <input checked="" type="checkbox"/> | Schedule issue for re-submission | SCHEDULED | | Admin Istrator | 04/Sep/19 1:13 PM |
| <input checked="" type="checkbox"/> | Schedule the escalation of overdue issues | SCHEDULED | | Admin Istrator | 04/Sep/19 1:14 PM |
| <input type="checkbox"/> | Transition affected issues when releasing a version | PROJECT EVENT | Version Released | Admin Istrator | 04/Sep/19 1:15 PM |

The rule navigator

Administration Search Jira admin

Applications Projects Issues **Add-ons** User management Latest upgrade report System

ATLASSIAN MARKETPLACE
Find new apps
Manage apps

ACTIVITY NOTIFICATION
Global Settings
User Settings

JIRA WORKFLOW TOOLBOX
Automation Rules
Import Rules
Expression Parser Test
Schedules
Configuration

ADMIN TOOLBOX
Project Shuttle

LASTLOG-ADD-ON
View log
Thread Dump

Automation Rules

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Name Status: All Trigger: All Event: All Creator: All X

| Status | Name | Trigger | Event | Creator | Created | Last modified |
|-------------------------------------|---|--------------------------|---------------|----------------|---------------------|-----------------|
| <input checked="" type="checkbox"/> | Add sub-tasks to issue on creation | ISSUE EVENT | Issue Created | Admin Istrator | 2 days ago 2:32 PM | Yesterday Admin |
| <input checked="" type="checkbox"/> | Assign issue on transition | ISSUE TRANSITIONED EVENT | | Admin Istrator | Yesterday 12:07 PM | Yesterday Admin |
| <input checked="" type="checkbox"/> | Assign issue to last assignee on transition | ISSUE TRANSITIONED EVENT | | Admin Istrator | 2 days ago 3:12 PM | 15/Jul Admin |
| <input checked="" type="checkbox"/> | Create sub-tasks depending on selected values in custom field | ISSUE EVENT | Issue Created | Admin Istrator | 2 days ago 3:44 PM | 20/Ma Admin |
| <input type="checkbox"/> | Keep priority of parents and sub-tasks in sync | FIELD CHANGED EVENT | | Admin Istrator | 2 days ago 1:40 PM | 19/Ma Admin |
| <input type="checkbox"/> | Notify project lead on priority change | FIELD CHANGED EVENT | | Admin Istrator | 2 days ago 11:27 AM | 15/Jul Admin |
| <input checked="" type="checkbox"/> | Raise priority of overdue issues every morning | FIELD CHANGED EVENT | | Admin Istrator | 12/Mar/19 1:48 PM | 12/Ma Admin |
| <input checked="" type="checkbox"/> | Remind users to resolve inactive issues | SCHEDULED RULE | | Admin Istrator | 1 week ago 1:34 PM | 1 week Admin |

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The rule navigator is your central location for managing your automation rules.

- 1 Add rules
- 2 Use the Actions menu to configure, edit, copy, and delete rules
- 3 See the current status and activate/deactivate rules
- 4 Search and filter rules
- 5 Import rules


2

Create your first rule

If you need some inspiration head over to a detailed guide on how to create rules: [Create, configure, and edit a rule](#)

Your first rule



 Start configuring your rule by adding a trigger.

Add Trigger

Field Changed Event

Rule is triggered by any changes made to issue fields (system fields and custom fields).

Issue Event

Rule is triggered by common Jira events: "Issue Created", "Issue Updated", "Issue Deleted", etc.

Issue Transitioned Event

Rule is triggered by any workflow transition.

Project Event

Rule is triggered by common Jira events: "Component Created", "Version Created", "Version Released", etc.

System Event

Rule is triggered by common system events (e.g. "User Created", "Project Created", etc.).

Scheduled

Rule is scheduled to run at predefined intervals (e.g. "Every morning at 6 AM", "Every second Monday at 9 AM", etc.).

Manual

Rule is triggered manually by clicking the corresponding Run now button.

Been there, done that? If you need even more inspiration, make sure to check out these [useful use cases](#) that will definitely get you started.

If you still have questions, feel free to refer to our [support team](#).