JIRA documentation for ABM(Basics to workflow Configuration)

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Complete Jira Setup Documentation
Developers Help Document

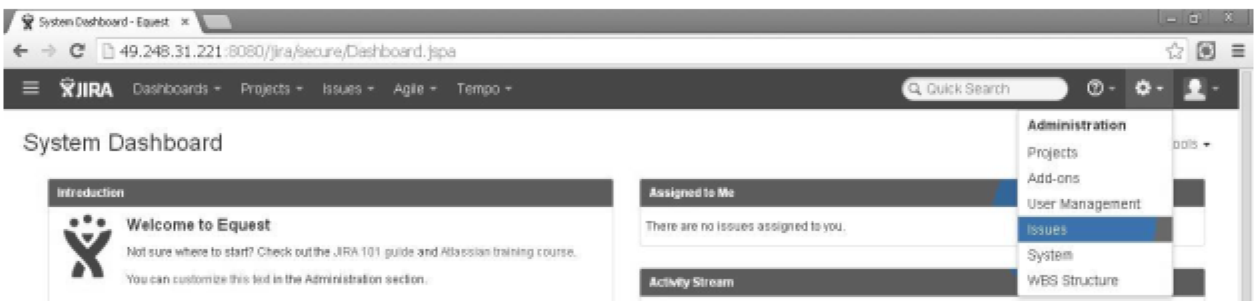
Equest Technologies Pvt. Ltd.

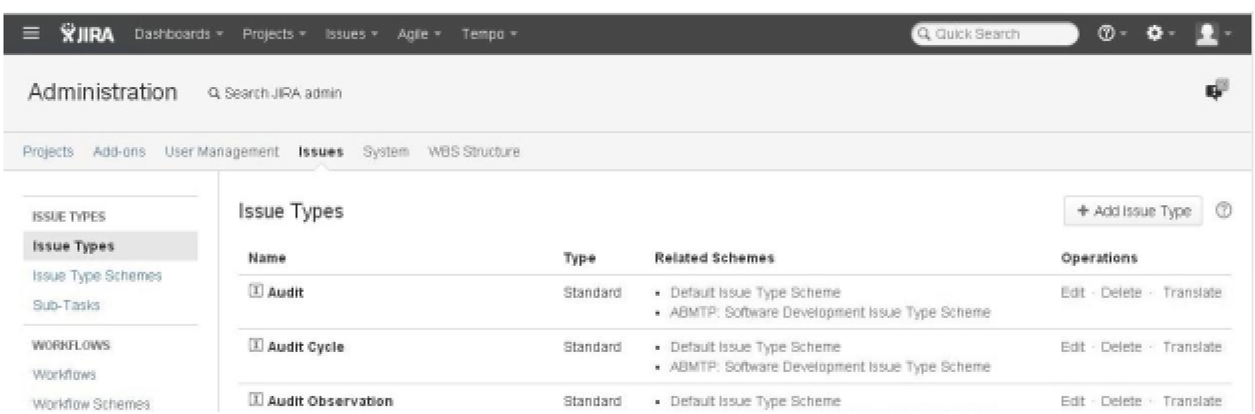
Index

JIRA Setup Documentation

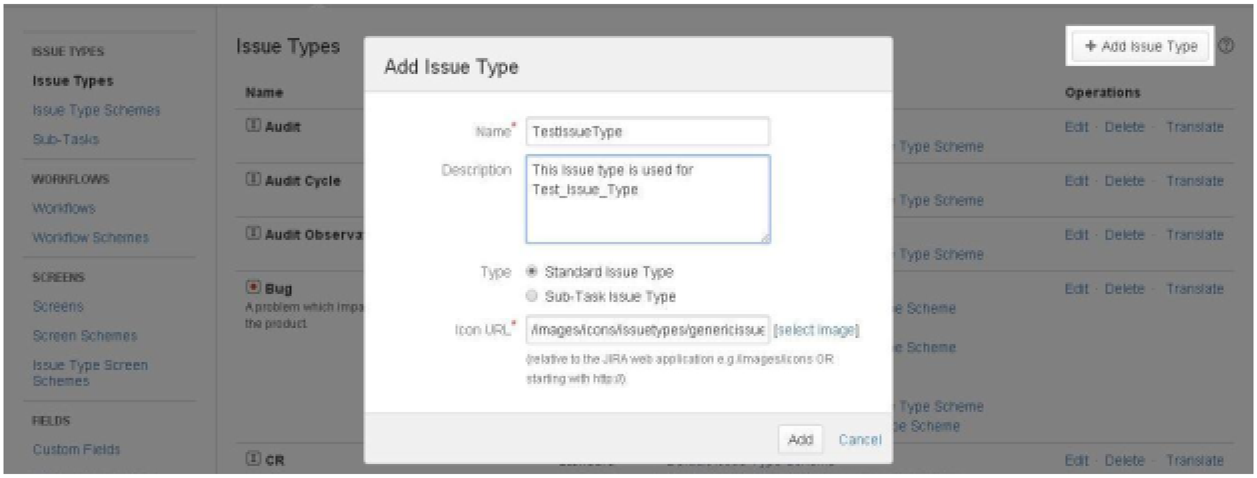
ISSUE TYPE
How to create a new issue type:

1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Issue Types** to open the 'Issue Types' page, which lists all issue types.





1. Click the **Add Issue Type** button to open the **Add New Issue Type** dialog box.



1. Complete the **Add New Issue Type** dialog box:
    - **Name** - Enter a short phrase that best describes your new issue type.
    - **Description** - Enter a sentence or two to describe when this issue type should be used
    - **Type** - Specify whether the issue type you are creating is a **Standard** issue type or a **Sub-Task** issue type.
    - **Icon URL** - Supply the path of an image that has been placed somewhere inside <jira-application-dir>/images/icons of your JIRA Installation Directory or from an accessible URL.
2. Click the **Add** button to create your new issue type.

To change the name, description or icon for an issue type:

1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Issue Types** to open the 'Issue Types' page, which lists all issue types.
3. Click the **Edit** link (in the **Operations** column) for the issue type that you wish to edit.

1. Edit the **Name**, **Description** and/or **Icon** as described above for creating an issue type.

1. Click on Update.

Following **Issue Types** have been created for **ABM JIRA** configuration,

Issue Type	Type	Description
Audit	Standard	This Issue type has been added for the use of **Audit** Workflow.
Audit Cycle	Standard	This Issue type has been added for the use of **Audit Cycle** Workflow.

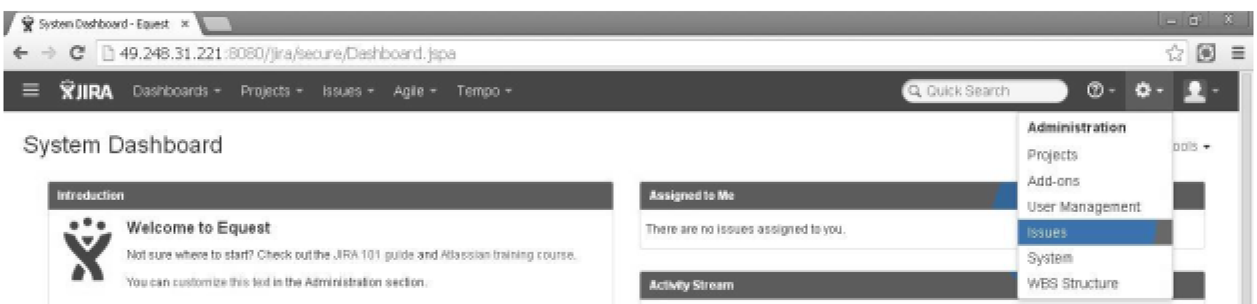
Audit Observation	Sub Task	This Issue type has been added for the use of **Audit Observation** Workflow. [Requirement changed from standard to sub task during UAT configuration]
Bug	Standard	This Issue type has been added for the use of **Defect Management** Workflow.
Improvement	Standard	This Issue type has been added for the use of **Enhancement** Workflow.
Enhancement Sub-Task	Sub Task	This Issue type has been added for the use of **Enhancement Sub-Task** Workflow.
Issue Management	Standard	This Issue type has been added for the use of **Issue Management** Workflow.
Risk	Standard	This Issue type has been added for the use of **Risk Management** Workflow.
Over All Risk	Standard	This Issue type has been added for the use of **SQA Risk** Workflow.
PI	Standard	This Issue type has been added for the use of **PI Flow** Workflow.
Service	Standard	This Issue type has been added for the use of **Service Management** Workflow.

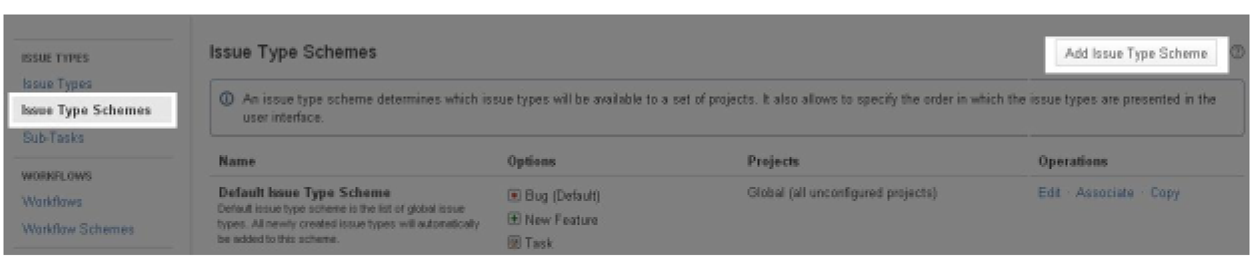
Associating Issue Types with Projects
An 'issue type scheme' defines a subset of issue types, which:

- Restricts the set of available issue types for a project, and
- Controls the order of available issue types and default issue type shown to users for a project.

A single issue type scheme can be "re-used" across multiple projects; so that a group of similar projects (i.e. projects which might be used for similar purposes) can share the same issue type settings.
ISSUE TYPE SCHEME
How to access the 'Issue Type Schemes' page:

1. Log in as a user with the **JIRA Administrator.**
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Issue Types > Issue Type Schemes** to open the 'Issue Type Schemes' page, which displays all existing issue type schemes, their related issue types and their associated projects.



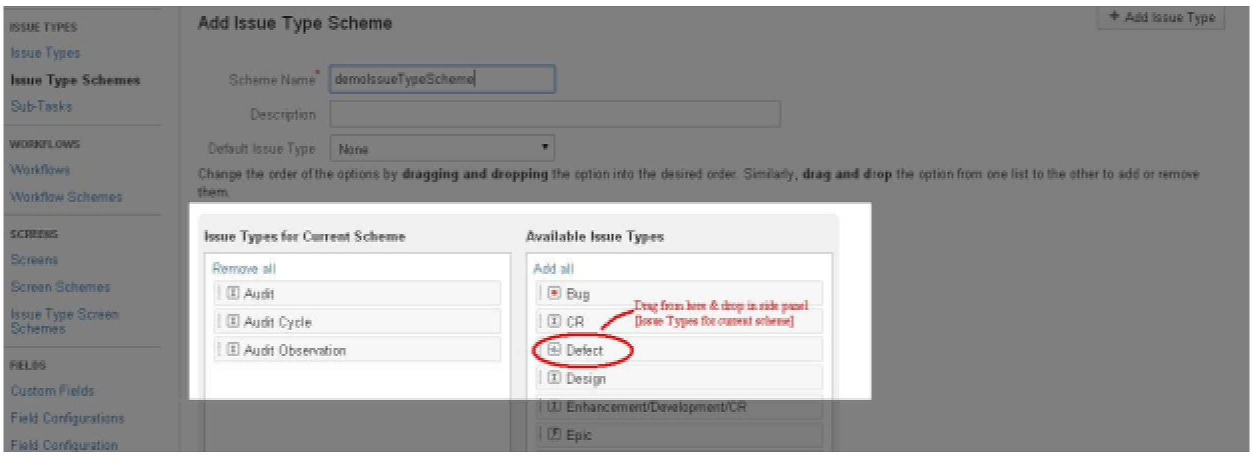


How to create a new issue type scheme:

- Go to the **Issue Type Schemes** tab (see above).
- Click the **Add Issue Type Scheme** button to open the **Add Issue Type Scheme** page.

- Enter the **Scheme Name** and **Description** for the new issue type scheme.

1. To add issue types to your scheme, drag and drop an issue type from the **Available Issue Types** list on the right to the **Issue Types for Current Scheme** list on the left:
2. If you need an issue type that does not currently exist, you can easily add this by using the **Add New Issue Type** button and dialog box. This will add the issue type to your JIRA system and also add it to **Issue Types for Current Scheme** list on the left.
3. To reorder the issue types, drag and drop them into the preferred positions.



1. Set the **Default Issue Type** for the new scheme from the dropdown list.

Please Note:

1. 'Default issue type' is issue type displayed in selection-box when user creates issue.
2. Issue types in this list depend on issues in **Issue Types for Current Scheme** list on left.
3. The **"None"** option means that there is no default value. If this option is selected, system will show first Issue Type listed in the **Issue Types for Current Scheme**.
4. The **Issue Type** is remembered as long as you keep creating issues in same project. Once you change projects or log off system, it goes back to *default* value.
5. Click the Save button to create your issue type scheme.

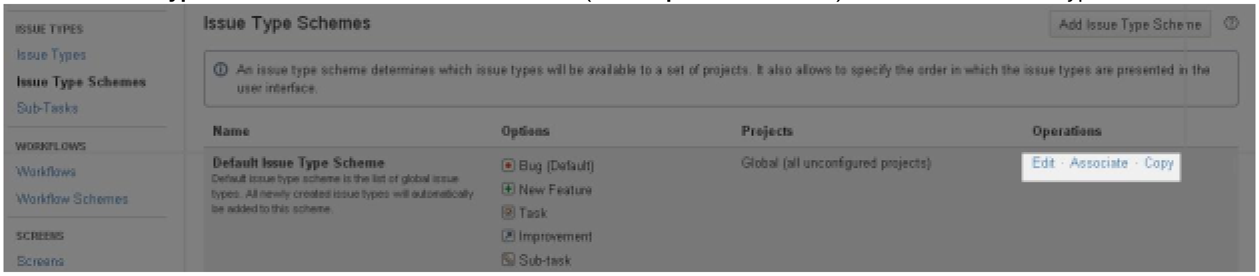
How to edit an Issue Type scheme:

- Go to the **Issue Type Schemes** tab.
- Click the **Edit** link (in **Operations** column) to access and edit relevant issue type scheme.

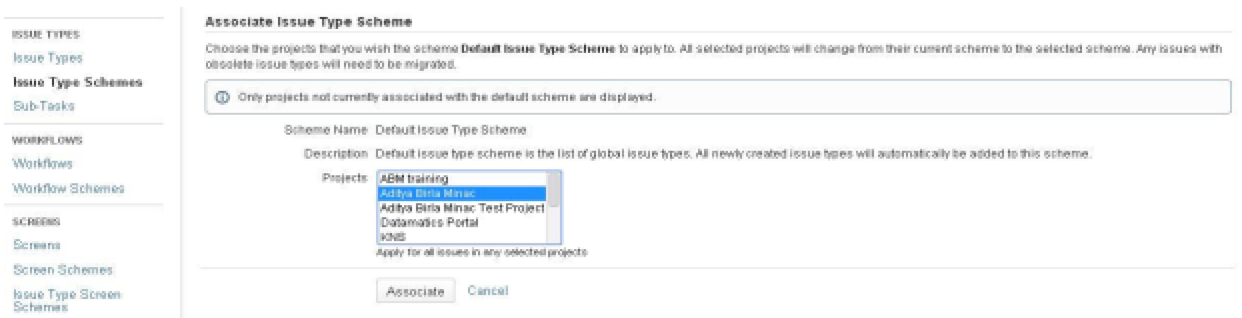
Please Note:

- The process of editing a scheme is identical to the creation process. While editing your issue type scheme, you can set the default 'default issue type' and reorder, add or remove issue types.
- If an issue type scheme has been associated with one or more JIRA projects and:
  - issues of the issue types (defined by this issue type scheme) already exist in any of these JIRA projects and
  - you then want to remove one or more of these issue types from this issue type scheme,
- You will be prompted to use the Issue Type Migration Wizard. This wizard will move your issues from the original issue type (which will no longer be applicable) to a valid one. If you cancel this process at any time, your changes will not be saved.

How to associate an issue type scheme with one or more projects:

1. Go to the **Issue Type Schemes** tab. Click the **Associate** link (in the **Operations** column) for the relevant Issue Type scheme.
2. 

3. Using the multi-select **Project** box, choose the JIRA projects that you wish to apply your issue type scheme to.

1. 

2. Click **Associate** button & all selected projects will change from their current scheme to selected scheme.

1. Click the **Associate** button and all selected projects will change from their current scheme to the selected scheme.

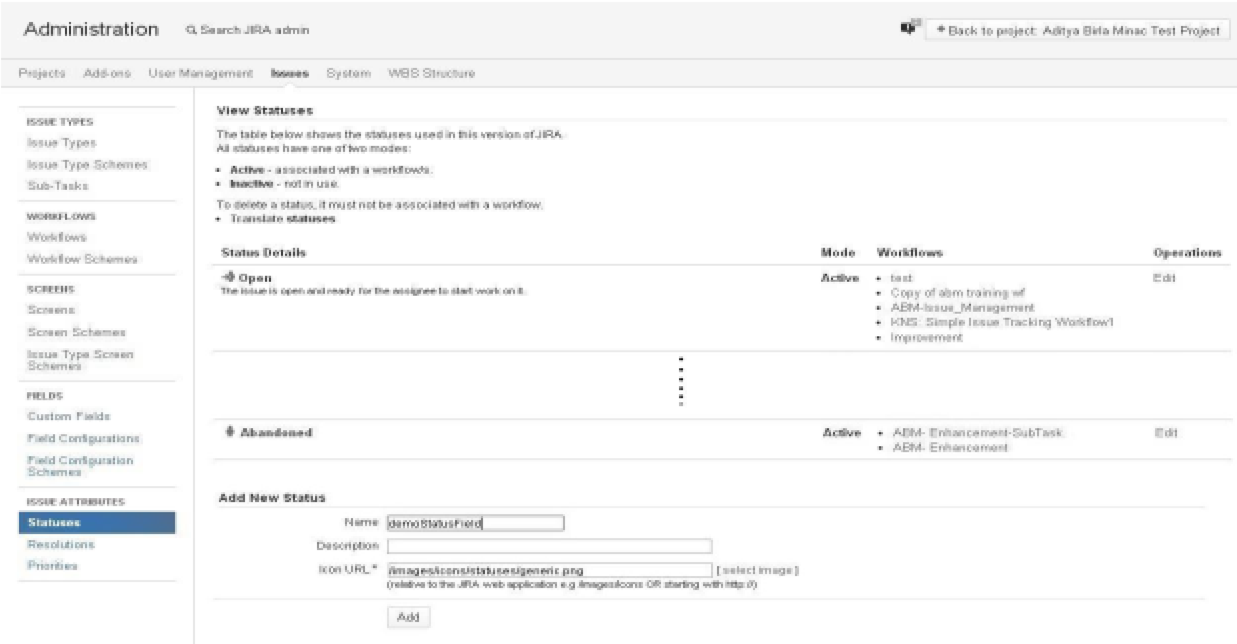
Following **Issue Type Scheme** have been created for **ABM JIRA** configuration,

Issue Type Scheme Name	**Issue Type**
ABMTP: Software Development Issue Type Scheme	Audit
	Audit Cycle
	Audit Observation
	Bug
	Improvement
	Enhancement Sub-Task
	Issue Management
	Risk
	Over All Risk
	PI
	Service

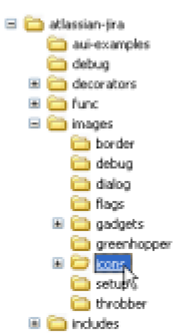
STATUS
Statuses are used to represent position of issue in its workflow. A workflow represents a business process, represented as a set of stages that an

issue goes through to reach a final stage (or one of the final stages). Each stage in the workflow (called a *workflow step)* is linked to an *issue status,* and an issue status can be linked to only one workflow step in a given workflow.
Defining a New Status

1. Log in as a user with the **JIRA Administrator**.



2.
3. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Statuses** to open the 'View Statuses' page, which lists all statuses, along with a form underneath to add a new status.



1. Complete the **Add New Status** form towards the end of the page:
2. **Name** - specify a short phrase that best describes your new status.
3. **Description** - add a sentence or two to describe what workflow step this status represents.
4. **Icon URL** - supply the path of image that has been placed somewhere inside <jira-application-dir>/images/icons of your JIRA Installation Directory or from an accessible URL.

JIRA ships with a number of images that can be used as status icons. These images are located in <jira-application-dir>/images/icons directory of your JIRA Installation Directory.
Editing / Deleting a Status
The **View Statuses** page can be used to **edit** and **delete** Statuses. Please note that only **Inactive** statuses (i.e. statuses that are not used in any workflow) can be deleted. A **Delete** link for deleting a Status will only appear next to the **Edit** link of an **Inactive** status.
Following **Status** have been created for ABM JIRA configuration,

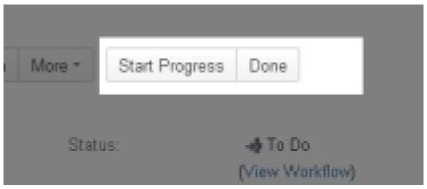
Name	Workflows
Open	ABM-Issue_Management ABM-PIFlow ABM-Audit_Observation ABM-RIsk_Management ABM-DefectManagement ABM-Service Management ABM-SQARisk
In Progress	ABM-Audit_Cycle ABM-Issue_Management ABM-PIFlow ABM-Audit_Observation ABM-DefectManagement ABM-Service Management ABM- Enhancement ABM- Enhancement-SubTask
Reopened	ABM-RIsk_Management
Closed	ABM-Audit_Cycle ABM-Issue_Management ABM-PIFlow ABM-Audit_workflow ABM-Audit_Observation ABM-RIsk_Management ABM-DefectManagement ABM-Service Management ABM-SQARisk ABM- Enhancement ABM- Enhancement-SubTask
Fixed	ABM-Service Management ABM-DefectManagement
Closure Verification	ABM-Service Management ABM-DefectManagement
Not In Scope	ABM-Service Management
Planned	ABM-Audit_workflow ABM-Audit_Cycle ABM- Enhancement-SubTask ABM- Enhancement
On Hold	ABM- Enhancement-SubTask ABM- Enhancement
Abandoned	ABM- Enhancement-SubTask ABM- Enhancement
Update	ABM-RIsk_Management ABM-SQARisk
Not a Defect	ABM-DefectManagement
Created	ABM-Audit_Cycle
Cancelled	ABM-Audit_workflow ABM-Audit_Cycle
Rejected	ABM-Audit_Observation ABM-PIFlow
Conducted	ABM-Audit_workflow

WORKFLOWS

A JIRA workflow is set of ***steps*** and ***transitions*** that an issue goes through during its lifecycle.
Steps and transitions
JIRA workflows consist of **steps** and **transitions**:

1. A **Step** represents a workflow's current status for an issue.
2. An issue can exist in one step only at any point in time.
3. Each workflow step corresponds to a **linked status**. When an issue is moved into a particular step, its **status** field is updated to the value of the step's **linked status**.
4. When defining a step, you can optionally specify properties, one of which allows you to make an issue un-editable while it is in that step.

Note: Although steps and statuses are treated separately when administering workflows, they are effectively synonymous concepts in JIRA and as such, it usually helps to name a step after its linked status.

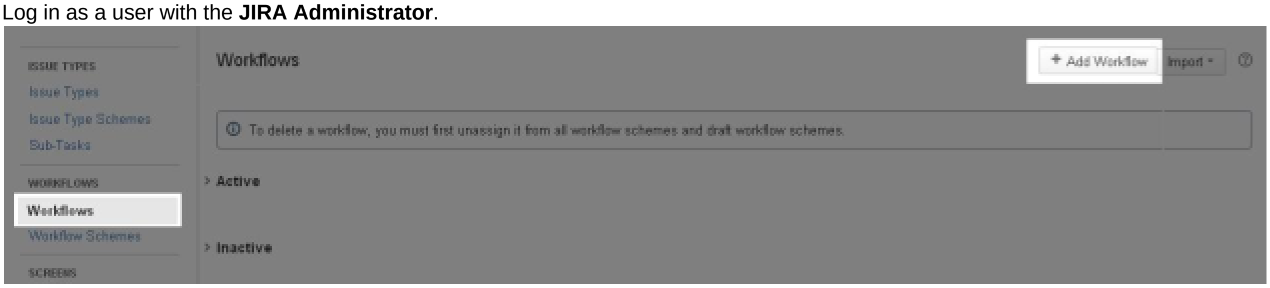
1. A **Transition** is a link between two steps.
    1. A transition allows an issue to move from one step to another step.
    2. 

    3. For an issue to be able to progress from one particular step to another, a transition must exist that links those two steps.
    4. A transition is a *one-way* link, so if an issue needs to move back and forth between two steps, two transitions need to be created.
    5. A user can execute a transition (i.e. move the issue through workflow) by clicking one of the available links.

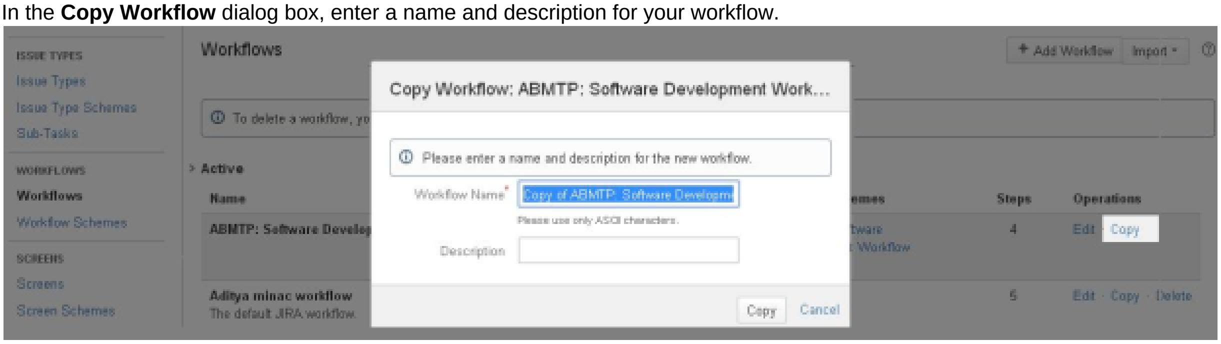
When defining a transition, you can optionally specify:

1.
    1. A **screen** to be displayed to the user - this is useful if you need the user to provide input before completing the transition.
    2. **Conditions -** controls who can perform a transition (i.e. who can see the transition link on the 'view issue' page).
    3. **Validators** - checks that any user-supplied input is valid before performing transition.
    4. **Post functions -** performs particular actions after the transition is complete, e.g.:
        1. Assign the issue to a particular user.
        2. Send an email notification.
        3. Update a field in the issue.

Creating a workflow

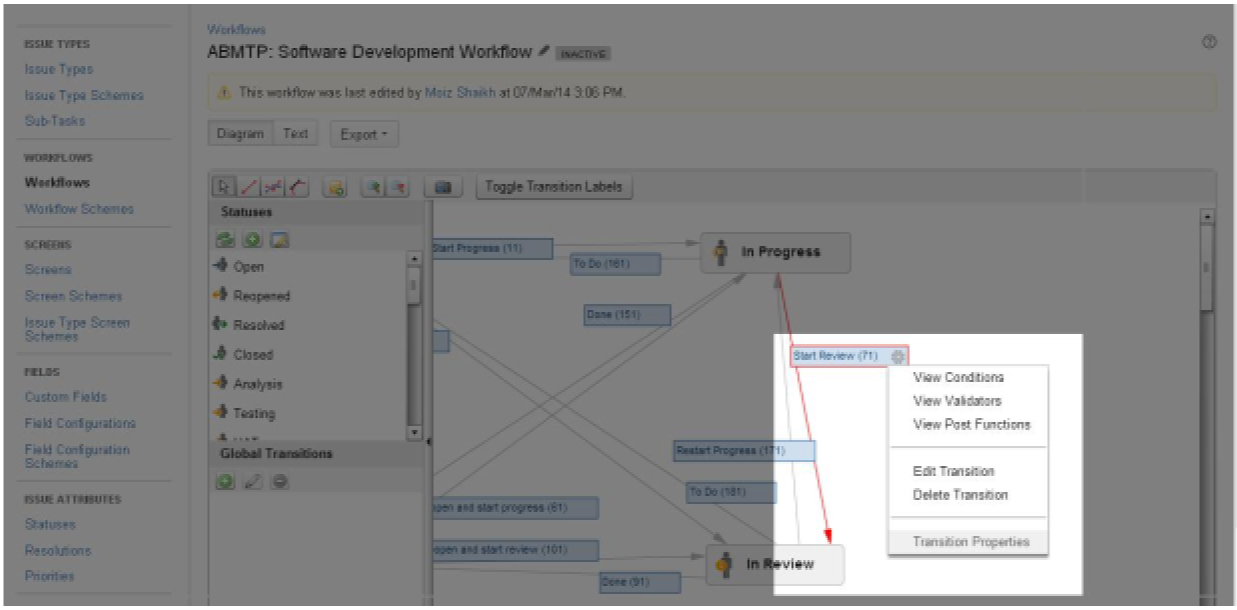
1. Log in as a user with the **JIRA Administrator**.
2. 

3. Choose the **cog icon**  at top right of the screen, and then choose **Issues**. Select **Workflows** to open the 'Workflows' page, which lists all existing workflows that have been defined in JIRA.

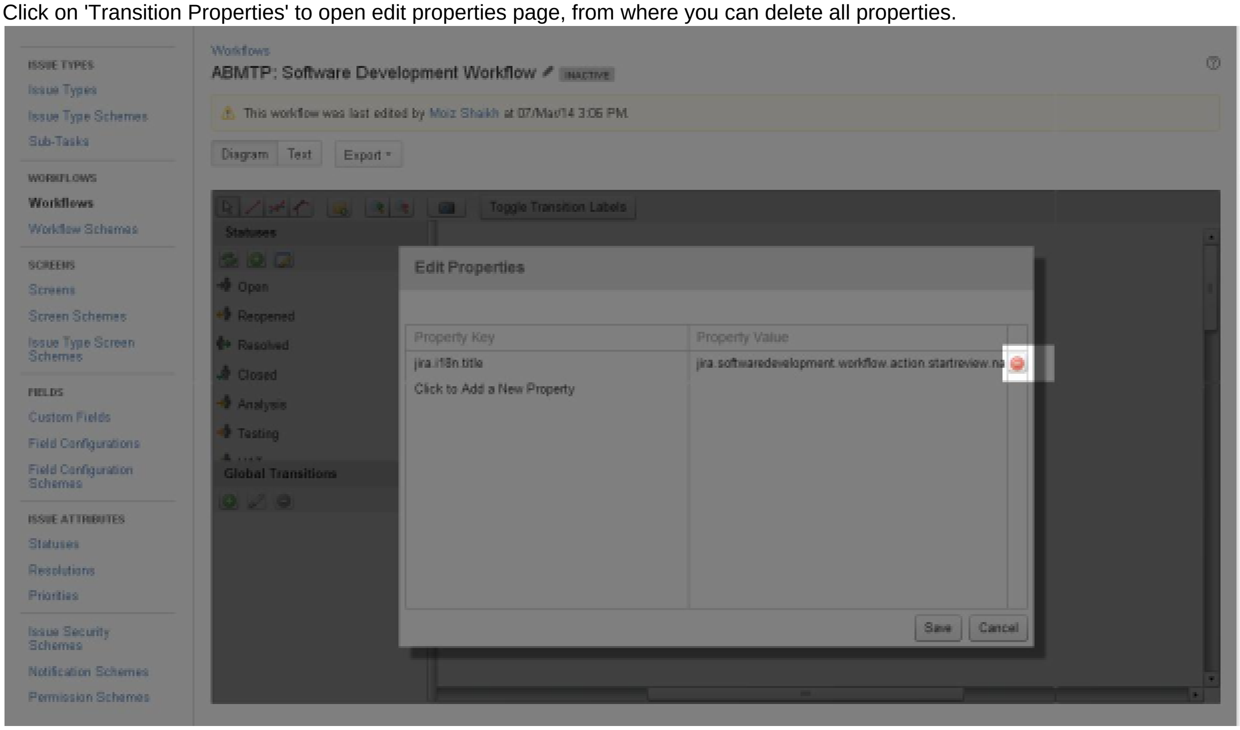
1. **Option 1 (Recommended Approach):** Copy an existing workflow using the **Copy** link for an existing workflow.
    1. In the **Copy Workflow** dialog box, enter a name and description for your workflow.
    2. 

    3. Click the **Copy** button. The workflow will open in edit mode, showing the layout of your copied workflow.

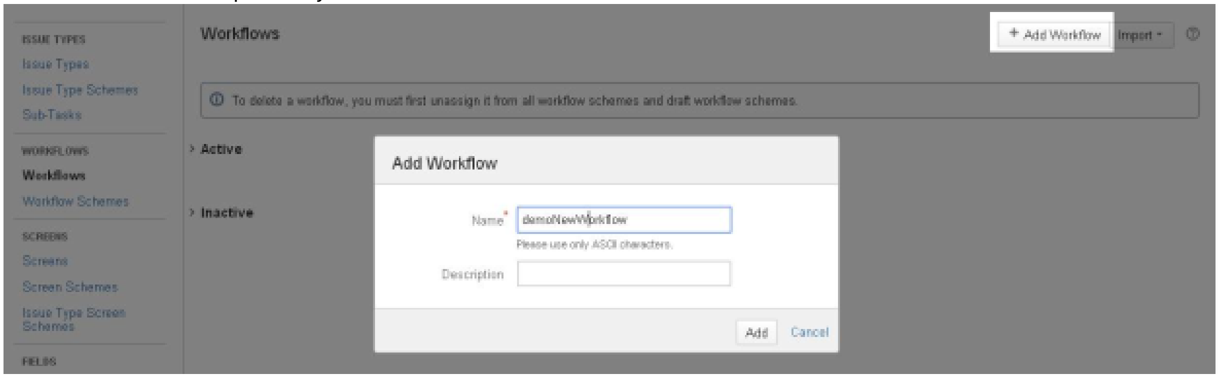
If you are copying the system workflow and wish to rename the workflow transition buttons on the 'view issue' page, you must delete the jira.i18n. title & jira.i18n.description properties from all transitions in the copied workflow. Otherwise, the default names (i.e. values of these properties) will persist.
To delete the jira.i18n.title & jira.i18n.description properties from all transitions in the copied workflow, select transition click on cog icon at the right of the transition name box.



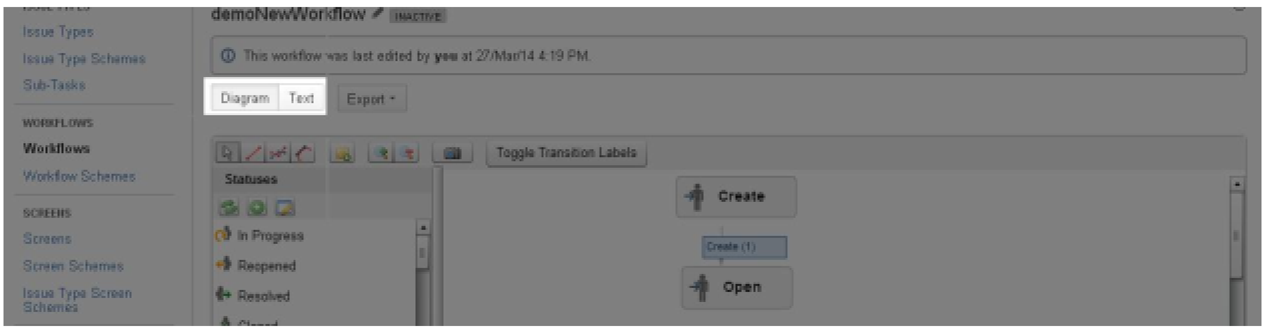
Click on 'Transition Properties' to open edit properties page, from where you can delete all properties.



1. **Option 2 (for Advanced Administrators):** Create a new workflow using the **Add Workflow** button:

1. Enter a name and description for your workflow.
2. 

3. Click the **Add** button.



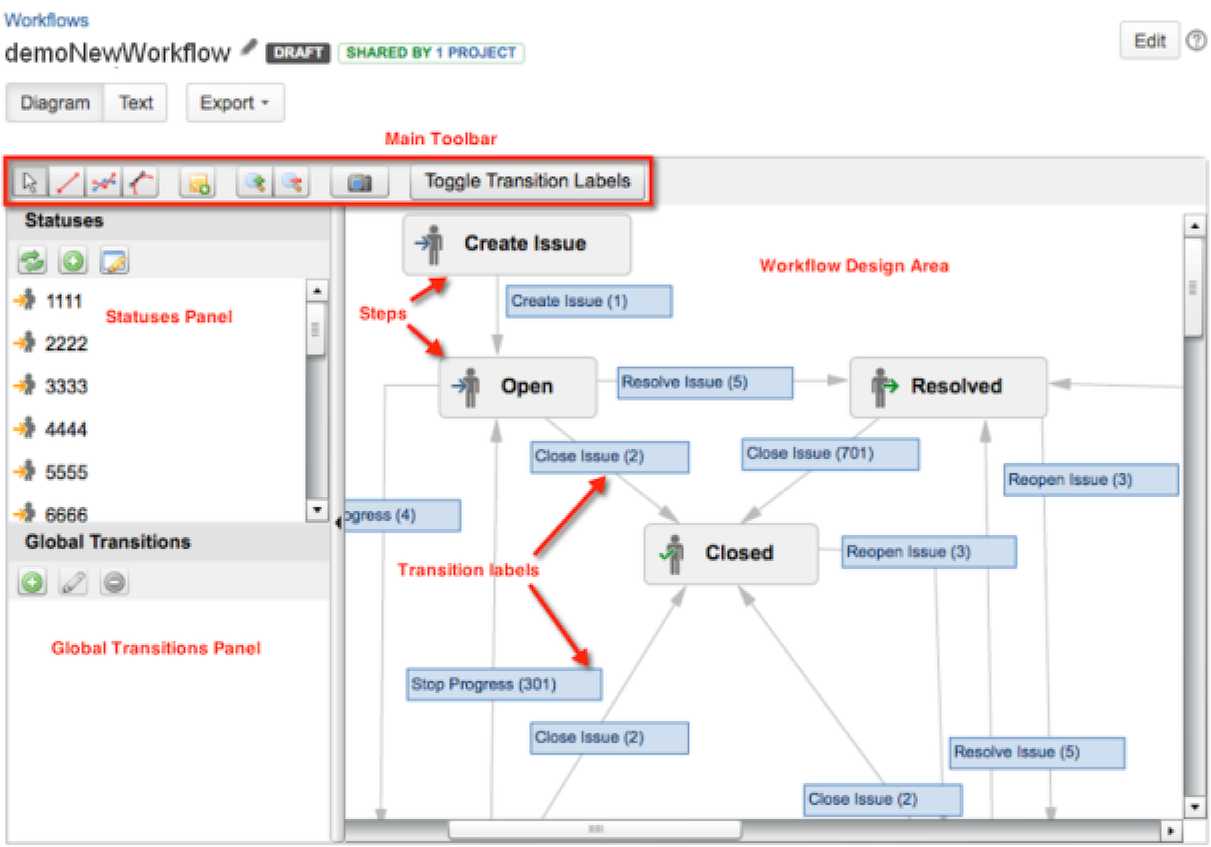
The workflow opens in edit mode and contains a step called **Open**. If you are viewing your workflow in **Diagram** mode, you see an incoming transition called **Create**.

1. Once you have created your new workflow (especially if you created a 'blank' workflow) you may want to customize it by adding and/or editing steps and transitions.
2. When you have finished customizing your new workflow, you need to activate workflow for a JIRA project.
3. **Diagram** edit mode allows you to visualize the entire layout of your workflow as well as create and edit a workflow's steps and transitions.

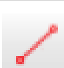
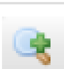
Using Diagram edit mode you can edit following;

- Using the main toolbar
- Using the 'Statuses' panel
- Using the 'Global Transitions' panel
- Using the workflow design area
- Editing or deleting annotations

The **Diagram** edit mode interface is shown in the following diagram.



The main toolbar lets you visually arrange your workflow's steps/statuses and transitions on the workflow design area.

Button	Description
	**Select Tool** - Selects, moves or edits any item on the workflow design area; selected items are highlighted in red. Click away from any item in the workflow design area to clear the selection.
	**Create Transition — Straight Line** - Creates a transition with a single straight line
	**Create Transition — Polygonal Line** - Creates a transition with multiple straight lines.
	**Create Transition — Bezier Line** - Creates a transition with a curved line.
	**Create Annotation** - Adds a 'sticky note' where you can add a short description or annotation to your workflow's layout.
	**Zoom In**

	**Zoom Out**
	**Save Snapshot Image** Saves an image of the current position of all items on the workflow design area in PNG format.
	**Toggle Transition Labels** Switches between hiding or revealing transition labels, each of which indicates their **Transition (id)**. To be able to edit all aspects of a transition – including its conditions, validators, post functions and properties – transition labels must be visible. If transition labels are hidden, you can only edit the **Transition Name**, **Description**, **Destination Step** and **Transition View** of a transition by double-clicking its transition line.

Using the 'Statuses' panel
The **Statuses** panel lists all available JIRA statuses that have not already been associated with a step on the workflow design area. It also provides tools for adding new statuses or editing existing ones.

Button	Description
	**Refresh List** - Refreshes the statuses list.
	**Adds New Status** - Adds a new global status to JIRA.
	**Status Editor** - Opens **Status Editor** dialog box where you can edit existing global status in JIRA.

Using the 'Global Transitions' panel
The **Global Transitions** panel lists all global transitions used in your workflow. A global transition is one in which the destination step of the transition has all other steps in the workflow as incoming steps, but only requires you to edit or update this transition in one place.
Note:

- Global Transitions are similar to – but not the same as – 'common transitions'.
- To avoid clutter, global transitions do not appear on the workflow design area. Instead, they display in the **Global Transitions** panel as well as every step of your workflow in **Text** edit mode.
- Global Transitions can only be edited / deleted in **Diagram** mode. They cannot be configured in **Text** mode.

The **Global Transitions** panel also provides tools for adding new global transitions, as well as editing or deleting existing ones.

Button	Description
	**Add New Transition** - Adds a new global transition to the workflow.
	**Edit Selected Transition** - Edits the currently selected global transition in the global transitions panel.
	**Delete Selected Transition** - Deletes the currently selected global transition in the global transitions panel, from the workflow.

Using the workflow design area
The workflow design area shows the layout of your workflow's steps as well as transitions, consisting of transition lines and labels.
Use the '**Select Tool**' to move these items around workflow design area.
Note:

- A workflow depicted in the workflow design area is what regular JIRA users will see when viewing the workflow from the 'view issue' page.
- Any changes that you make to items in the workflow design area (including their layout) are automatically saved whenever you leave Diagram edit mode for your workflow.

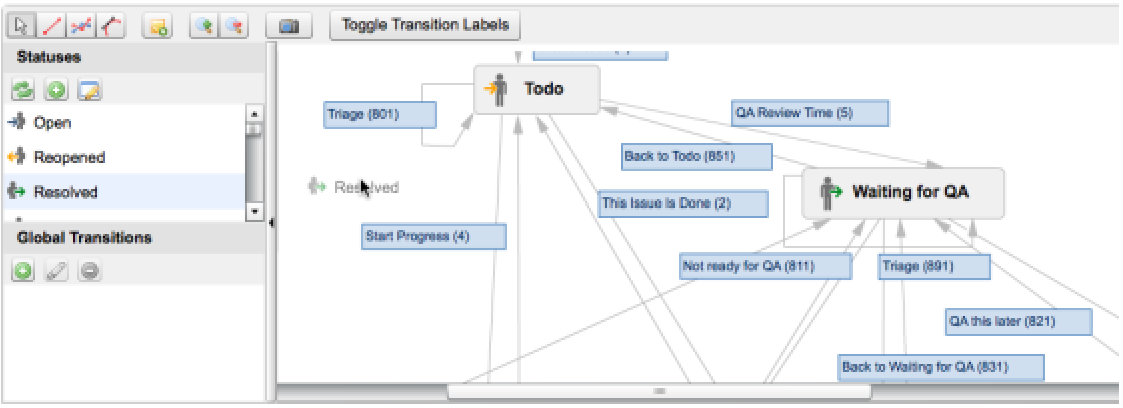
Editing or deleting annotations
Once you have added an annotation using the Create Annotation tool (above), you can do the following:

- To resize an annotation, drag the edges or corners of the 'sticky note'.
- To edit text inside an annotation, click inside annotation & begin modifying text.
- To remove an annotation, click the X at the top-right of the 'sticky note'.

Working with steps

1. **Adding a new step to a workflow:**
2. Log in as a user with the **JIRA Administrator**.
3. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Workflows** to open the 'Workflows' page, which lists all existing workflows that have been defined in JIRA.
4. Click the **Edit** link next to the workflow that you wish to add a step to.
5. Use either **Diagram** or **Text** edit mode pages to add the new step to the workflow.

Using Diagram edit mode to add the new step

1. Make sure that your workflow is in **Diagram** edit mode. Your workflow's existing steps as well as the lines and labels of transitions between these steps are shown in the workflow design area.
2. 

3. Drag an available status from the **Statuses** panel list and drop it onto the workflow design area. A new step is added to your workflow.

Note:

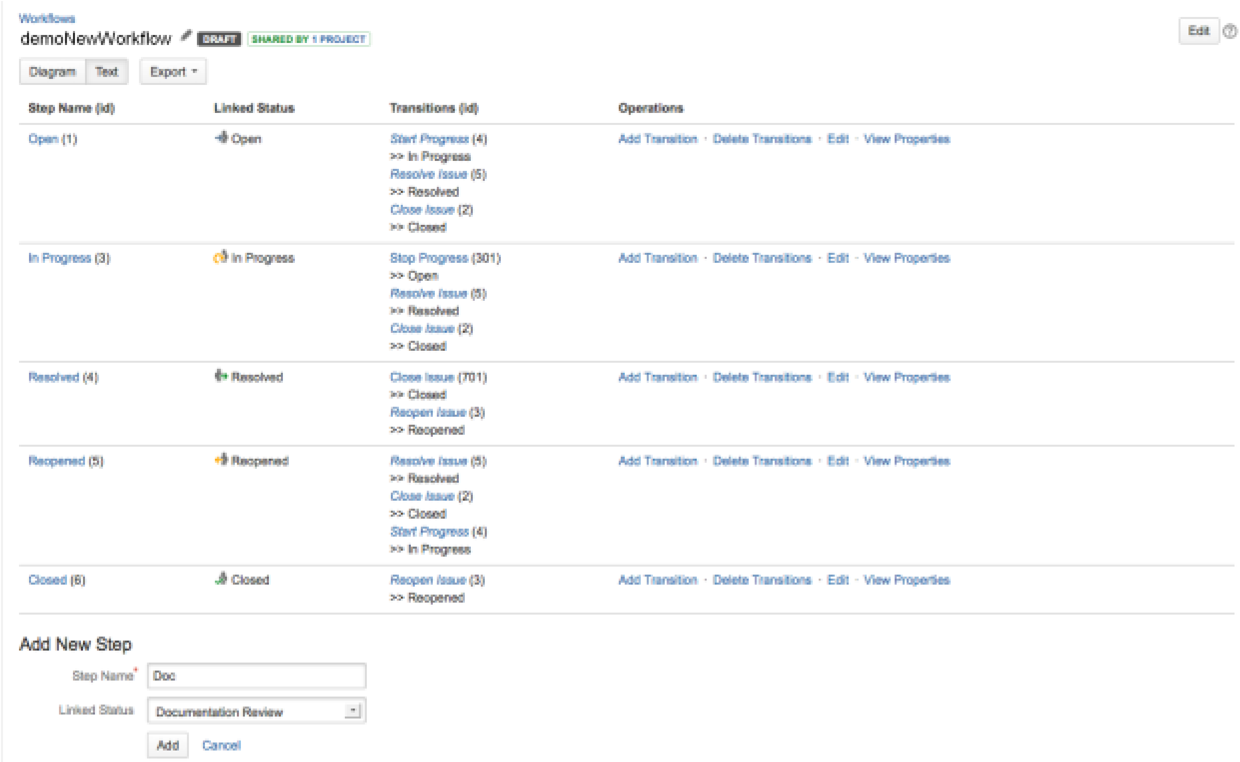
- The name of the status, which is equivalent to the **Linked Status** indicated in **Text** edit mode, is assigned to the step's **Step Name (id)**. This step name is displayed on the step you dragged from the **Statuses** panel to the workflow design area.
- Because steps on the workflow design area depict step names, if you use the **Statuses** panel (in **Diagram** edit mode) to change the name of a status that has already been added to the workflow design area, the step name will remain unchanged in this area.

Using Diagram edit mode to add the new step

1. Make sure that your workflow is in **Text** edit mode. A list of existing steps making up the workflow and each step's **Linked Status** and **Ou tgoing Transitions** (under **Transitions (id)**) is shown.

Note:

- The **Add New Step** form appears below the list of steps. However, this will only be shown if the workflow is inactive or you are editing the draft of an active workflow.
- If no fields appear in this form, then all available statuses defined in your JIRA installation have been used in your workflow and you need to define a new status.

- 

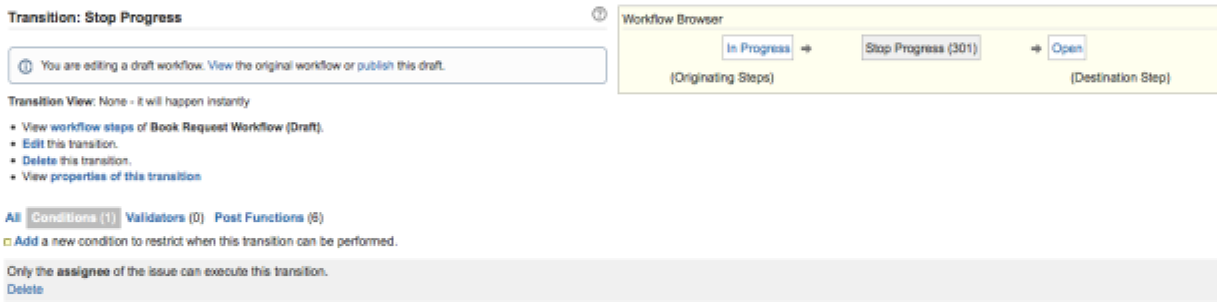
- Italicized transitions shown under **Transitions (id)** are 'common transitions'.

1. In the **Step Name** field, type a short name for the step.
2. In the **Linked Status** field, select the status that corresponds to this step. Each status can only correspond to one step in each workflow. Hence, if all statuses are linked to steps in this workflow.
3. Click the **Add** button. Your new step appears in your workflow's list of steps in **Text** edit mode.

1. **Editing a step**
2. Log in as a user with the **JIRA Administrator**.
3. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Workflows** to open the 'Workflows' page, which lists all existing workflows that have been defined in JIRA.
4. Click the **Edit** link next to the workflow that you wish to add a step to.
5. Make sure **Text** button is selected so that your workflow appears in **Text** edit mode. A list of existing steps that comprise the workflow and each step's **Linked Status** and **Outgoing Transitions** (under **Transitions (id)**) is shown.

Click the following link of any step:

- **Add Transition** - to add an **Outgoing Transition** to that step.
- **Delete Transitions** - to delete one or more **Outgoing Transitions** of that step. This link is only available if the step has at least one outgoing transition.
- **Edit** - to edit the step's **Step Name** or **Linked Status**.
- **View Properties** - to view and edit the step's **Properties**.
- **Delete Step** - to do just that. This link is only available if step has no **Incoming Transitions**.



Alternatively, you can access a step's **View Workflow Step** page to edit the step. To access this page, click the name of the step you wish to edit in the **Step Name (id)** column (e.g. **Open**). The step's **View Workflow Step** page is displayed.

On **View Workflow Step** page, the following information is shown about the step:

-
    - On the left of the **View Workflow Step** page:
- **Linked Status** - status (used globally throughout JIRA) to which your specific workflow step is linked.
    - In the **Workflow Browser** section on the right:
- **Incoming Transitions** - transitions whose **Destination Step** is step you are currently viewing. To allow issues to move into this step, there must be at least one incoming transition.
- **Outgoing Transitions** - transitions whose **Originating Step** is step you are currently viewing. To allow issues to move out of this step, there must be at least one outgoing transition.

On the **View Workflow Step** page, you can:

-
    - Click '**Add** outgoing transition' to do just that to the step.
    - Click '**Delete** outgoing transitions' to delete one or more **Outgoing Transitions** of the step. This option is only available if step has at least one outgoing transition indicated in **Workflow Browser** section.
    - Click '**Edit** step' to edit step's **Step Name** or **Linked Status**.
    - Click '**Delete** Step' to do just that. This option is only available if the step has no incoming transitions indicated in the **Workflow Browser** section.
    - Click '**View** step's properties' to view and edit the step's **Properties**.
    - View and edit any of the step's **Incoming Transitions** or **Outgoing Transitions**, by clicking the name of a transition in the **Work flow Browser** section.

1. **Using step properties**

You can use a workflow step's properties to prevent issues from being edited in a particular workflow step. For example, in a copied system workflow, **Closed** issues cannot be edited, even by users who have the **Edit Issue** project permission.
Note:

- Issues that cannot be edited cannot be updated using Bulk edit.
- You can only edit the properties of a workflow's step if that workflow is editable (i.e. if that workflow is either inactive or a draft of an active workflow).

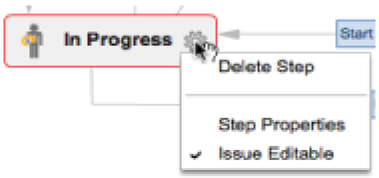
To stop issues from being editable in a particular workflow step or to set any property of a step:

1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Workflows** to open the 'Workflows' page, which lists all existing workflows that have been defined in JIRA.
3. Click the **Edit** link next to the workflow whose:

- step you wish to make uneditable or
- step's property you wish to set

1. Use either **Diagram** or **Text** edit mode to set the workflow step's property.

Using 'Diagram' edit mode to set the step's property:

1. 

2. Make sure that your workflow appears in **Diagram** edit mode. Your workflow's existing steps are shown in workflow design area.
3. Move mouse pointer over relevant step & click cog icon that appears to right of step to reveal popup menu.
4. From the popup menu, select **Issue Editable** to remove the tick from that menu item. This action sets the step's jira.issue.editable property and its value to false.

Note:

- Selecting **Issue Editable** from popup menu again (to add the tick) sets the value of the jira.issue.editable property key to true. Conversely, deleting the step's jira.issue.editable property in **Text** edit mode adds the tick back to **Issue Editable** popup menu.
- Selecting **Step Properties** from popup menu opens the **Edit Properties** dialog box, which allows you to specify additional properties (other than jira.issue.editable property) on a step. On the **Edit Properties** dialog box, you can:
    - Add a new property to the step.
    - Edit a property's key or value, by simply clicking the property's key or value to begin editing it.
    - Delete a property, by clicking the icon to the right of the property and its value.

Using 'Text' edit mode to set the step's property:

1. Ensure the **Text** button is selected, so that your workflow appears in **Text** edit mode. A list of existing steps making up the workflow is shown.
2. Click **View Properties** link that corresponds to relevant step. The **View Workflow Step Properties** page is displayed, showing step's existing properties (if any). The **Add New Property** form appears below list of existing properties (if any have already been defined).

Note: The **Add New Property** form will not appear if step's workflow is not editable.

1. In **Property Key** field, type: jira.issue.editable (or any other **Property Key** you wish to add).
2. In **Property Value** field, type: false (or any other **Property Value** you wish to add).
3. Click the **Add** button.

Note:

- It is not possible to edit a step's properties on this page. To change any property's key or value (or both), you must first delete property you wish to change & add new updated property.
- It is possible to implement restrictions on steps using step properties.

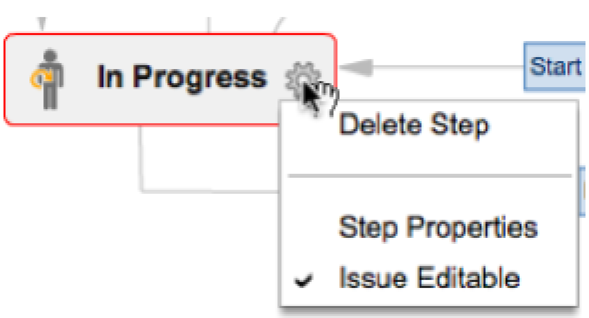
1. **Deleting a step**

A step can only be deleted if it has no incoming transitions.
To delete a step from a workflow:

1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Workflows** to open the 'Workflows' page, which lists all existing workflows that have been defined in JIRA.
3. Click the **Edit** link next to the workflow whose step you wish to delete.
4. Use either **Diagram** or **Text** edit mode to delete the step from the workflow.

Using 'Diagram' edit mode to delete the step

1. Make sure that your workflow appears in **Diagram** edit mode. Your workflow's existing steps are shown in workflow design area.
2. Move the mouse pointer over the relevant step and click the cog icon that appears to the right of the step to reveal a popup menu.



1. From the popup menu, select **Delete Step** to remove the step from the workflow.

Using 'Text' edit mode to delete the step

1. Make sure that your workflow appears in **Text** edit mode. A list of existing steps making up the workflow is shown.
2. Click the **Delete Step** link that corresponds to the relevant step.

This link will only be shown if the step has no incoming transitions nor would it show if it only has incoming **Global Transitions.**
Working with Transitions

1. 1. **Adding a new transition to a workflow:**
    1. 1. Log in as a user with the **JIRA Administrator**.
        2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Workflows** to open the 'Workflows' page, which lists all existing workflows that have been defined in JIRA.
        3. Click the **Edit** link next to the workflow you wish to add a transition to.
        4. Use either the **Diagram** or **Text** edit mode to add the transition to the workflow.

Using 'Diagram' edit mode to add the transition

1. Make sure that your workflow is in **Diagram** edit mode. Your workflow's existing steps as well as the lines and labels of transitions between these steps are shown in the workflow design area.
2. Click the appropriate **Create Transition** button in the main toolbar, according to the type of transition line you wish to create.
3. In the workflow design area, click the step that will be the **Originating Step** of the transition.
4. Click the step that will be the **Destination Step** of the transition.
5. Choose between creating a new transition (**New Transition**), copying an existing transition (**Clone Transition**) or using a 'common transition' (**Use Common Transition**).

- If you choose either **New Transition** or **Clone Transition**:

1. In **Transition Name** field, type short name for transition.

This name will be shown to users on the relevant transition button, within the 'operations bar' of the 'view issue' page.

1. *(Optional)* In **Description** field, type short description of purpose of transition.
2. If you chose:

- **New Transition**, then in the **Transition View** field, select either:
- **No view for transition** — choose this if you do not need to prompt the user for input before the transition is executed (i.e. the transition will occur instantly when the user clicks the transition).
- The name of a screen that will be shown to users, asking for input before the transition is executed. You can choose one of JIRA's default screens or any other screen you have created. If no existing screen is suitable, you may want to create a new screen.

Many of JIRA's default screens are used in a copied system workflow (above) and named after the transitions they are used in (e.g. **Start Progress** and **Resolve Issue**).

- **Clone Transition**, then in the **Transition To Clone** field, select transition you wish to copy.

Copying an existing transition creates a new independent copy of a transition, which does not result in a 'common transition'.

- If you choose **Use Common Transition**, select an existing transition (currently used in your workflow which also leads to your **Destination Step**) from the **Transition To Reuse** dropdown list.

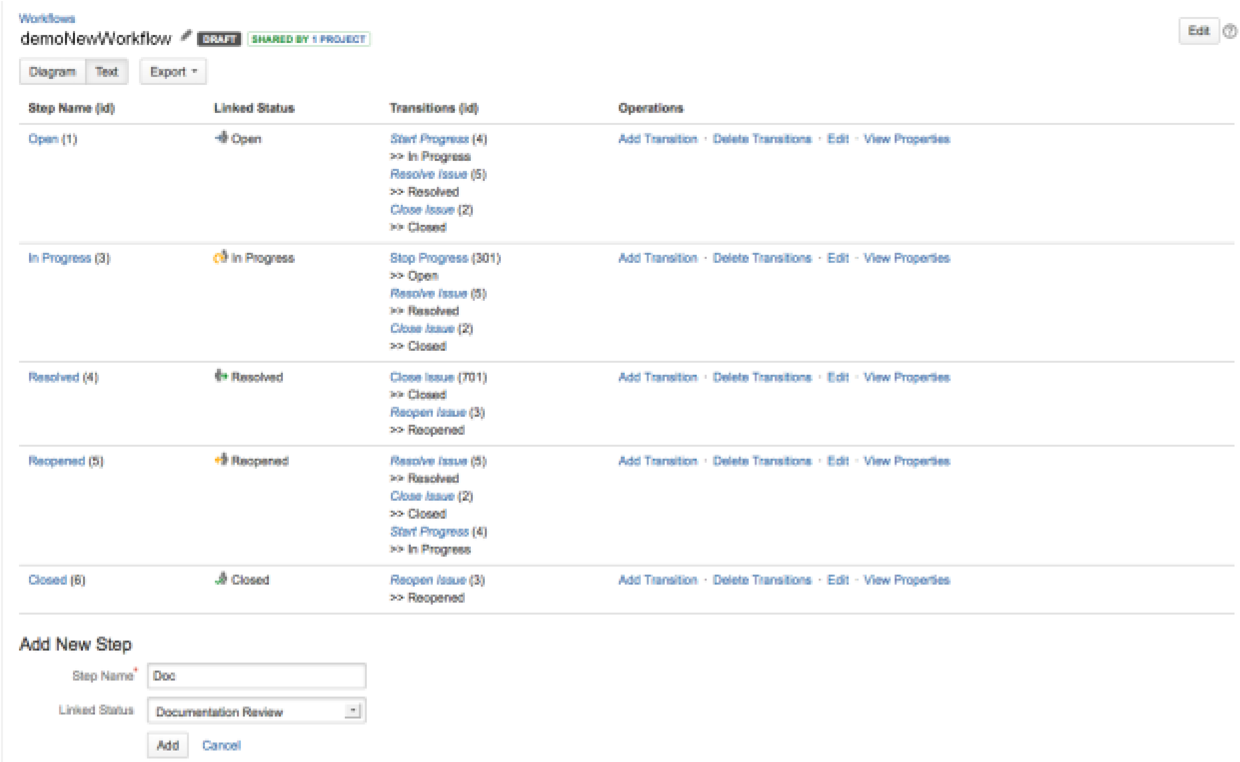
Note:

- Existing transitions in your workflow which do not lead to your **Destination Step** will not be available from the **Transition To Reuse** drop down list.
- You can select either an existing 'common transition' or an ordinary transition (i.e. a transition that has only been used once on the workflow). If you select an ordinary transition, it will be converted to a 'common transition'.

1. Click the **OK** button to complete the addition of your transition.

Using 'Text' edit mode to add the transition

1. Make sure that your workflow appears in **Text** edit mode. A list of existing steps that make up the workflow and each step's **Linked Status** and **Outgoing Transitions** (under **Transitions (id)**), is shown.



1. Identify the step from which your new transition will originate and click the **Add Transition** link next to the step. The **Add Workflow Transition** page is displayed.
2. In the **Transition Name** field, type a short name for the transition.

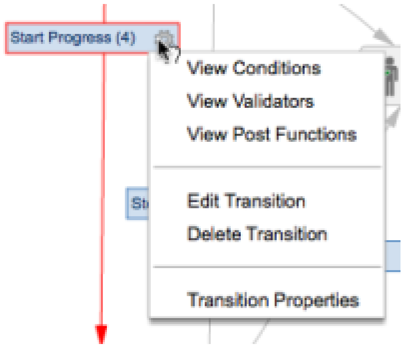
This name will be shown to users on the relevant transition button, within the 'operations bar' of the 'view issue' page.

1. *(Optional)* In the **Description** field, type a short description of the purpose of the transition.
2. In the **Destination Step** field, choose the step to which issues will move when this transition is executed.
3. In the **Transition View** field, select either:

- **No view for transition** — choose this if you do not need to prompt the user for input before the transition is executed (i.e. the transition will occur instantly when the user clicks the transition).
- The name of a screen that will be shown to users, asking for input before the transition is executed. You can choose one of JIRA's default screens or any other screen you have created. If no existing screen is suitable, you may wish to create a new screen for the transition.

1. 1. **Editing or deleting an existing transition of a workflow:**
    1. 1. Log in as a user with the **JIRA Administrator**.
        2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Workflows** to open the 'Workflows' page, which lists all existing workflows that have been defined in JIRA.
        3. Click the **Edit** link next to the workflow you wish to add a transition to.
        4. Use either the **Diagram** or **Text** edit mode to add the transition to the workflow.

Using 'Diagram' edit mode to edit or delete the transition

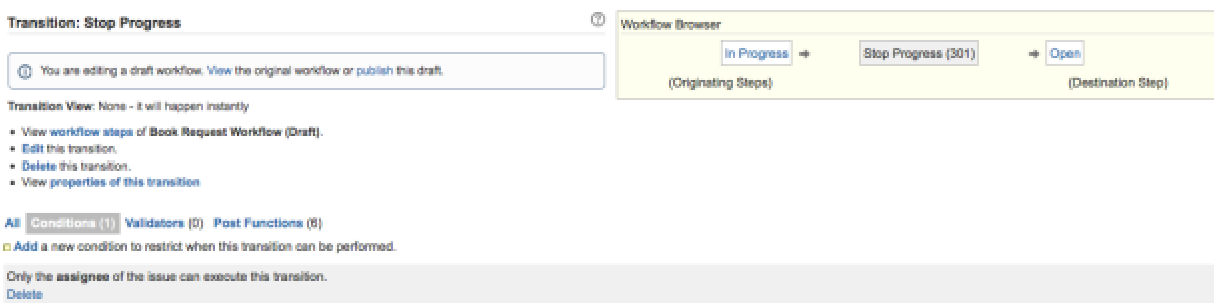


1.
2. Make sure that your workflow appears in **Diagram** edit mode. Your workflow's existing steps as well as the lines and labels of transitions between these steps are shown in workflow design area.
3. Move the mouse pointer over the relevant transition label and click the cog icon that appears to the right of the label to reveal a popup menu.
4. From the popup menu, you can:

- Select **Edit Transition** to edit **Transition Name**, **Description**, **Destination Step** and **Transition View** of the transition.
- Select **Transition Properties** to edit the transition's **Properties**.

Using 'Text' edit mode to edit or delete the transition

1. Make sure that your workflow appears in **Text** edit mode. A list of existing steps that make up the workflow and each step's **Linked Status** and **Outgoing Transitions** (under **Transitions (id)**), is shown.
2. In the **Transitions (id)** column, click the link of the **Outgoing Transition** of the step you wish to edit. The **Transition** page is displayed.



On the **Transition** page, the following information is shown about the transition:

- On the left of the **Transition** page:
- **Transition View** — the screen (usable globally) that your specific workflow transition uses. If your workflow transition does not require a view (i.e. no screen has been specified), then **none - it will happen instantly** is shown.
- In the **Workflow Browser** section:
- **Originating Steps** — steps whose **Outgoing Transition** is the transition you are currently viewing.
- **Destination Step** — the step whose **Incoming Transition** is the transition you are currently viewing.

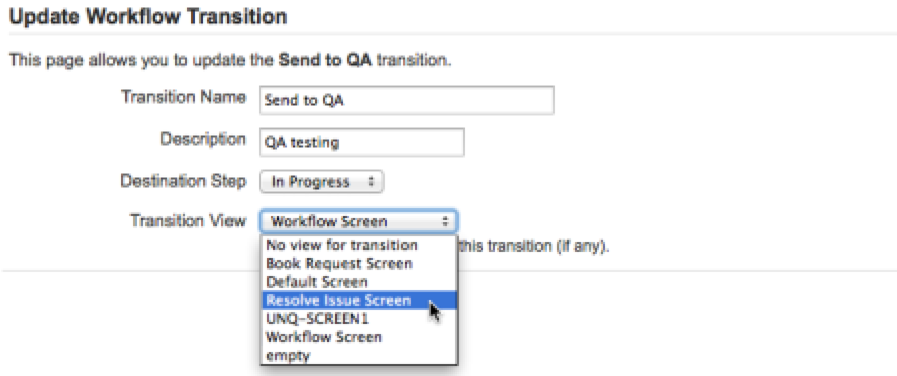
1. On the **Transition** page, you can:

- Click '**Edit** this transition' to edit the **Transition Name**, **Description**, **Destination Step** and **Transition View** of the transition.
- Click **'Delete** this transition' to do just that. This link is only available if the step has at least one outgoing transition indicated in the **Workfl ow Browser** section.
- Click 'View **properties of this transition**' and edit the transition's **Properties**.
    1. **Using a screen with a transition**

When a user clicks a particular transition, a screen can be used to gather input from the user before the transition is executed
Example: using a screen to set the Resolution field

For a particular step in a workflow, you might need to create a transition that moves the issue to a 'closed' status
To do this:

1. 1. 1. 1. Create or edit your transition.
            2. Select the **Resolve Issue Screen** - which contains **Resolution**, **Fix Version/s**, **Assignee** and **Log Work** fields – in the **Transition View** field.



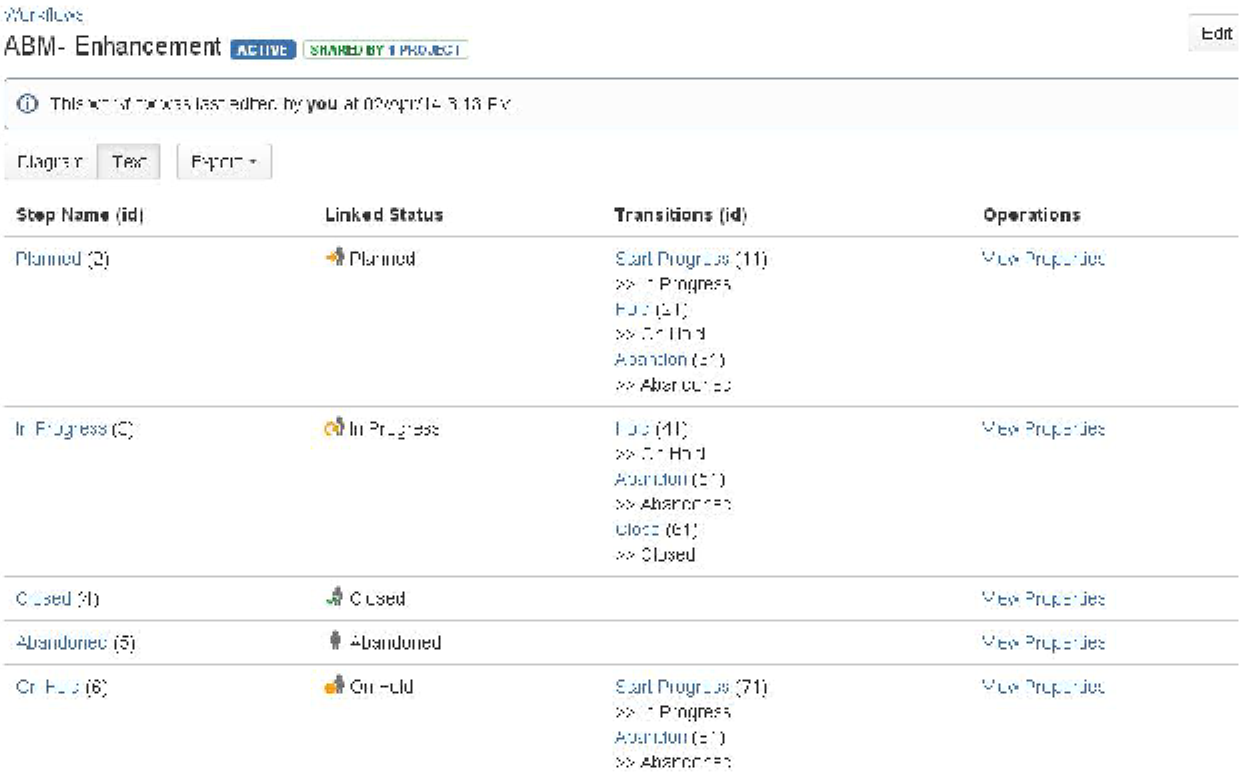
Following **Workflows** have been created for **ABM JIRA** configuration,

Name	Assigned Schemes	Description
ABM- Enhancement	ABM_workflowScheme	This Workflow has been configured for **Enhancement** type of Issues
ABM- Enhancement-SubTask	ABM_workflowScheme	This Workflow has been configured for **Enhancement-SubTask** type of Issues
ABM-Audit_Cycle	ABM_workflowScheme	This Workflow has been configured for **Audit Cycle** type of Issues
ABM-Audit_Observation	ABM_workflowScheme	This Workflow has been configured for **Audit Observation** type of Issues
ABM-Audit_workflow	ABM_workflowScheme	This Workflow has been configured for **Audit** type of Issues
ABM-DefectManagement	ABM_workflowScheme	This Workflow has been configured for **Defect Management** type of Issues
ABM-Issue_Management	ABM_workflowScheme	This Workflow has been configured for **Issue Management** type of Issues
ABM-PIFlow	ABM_workflowScheme	This Workflow has been configured for **PI Flow** type of Issues
ABM-RIsk_Management	ABM_workflowScheme	This Workflow has been configured for **Risk Management** type of Issues
ABM-Service Management	ABM_workflowScheme	This Workflow has been configured for **Service Management** type of Issues
ABM-SQARisk	ABM_workflowScheme	This Workflow has been configured for **Over All Risk** type of Issues

ABM_Enhancement

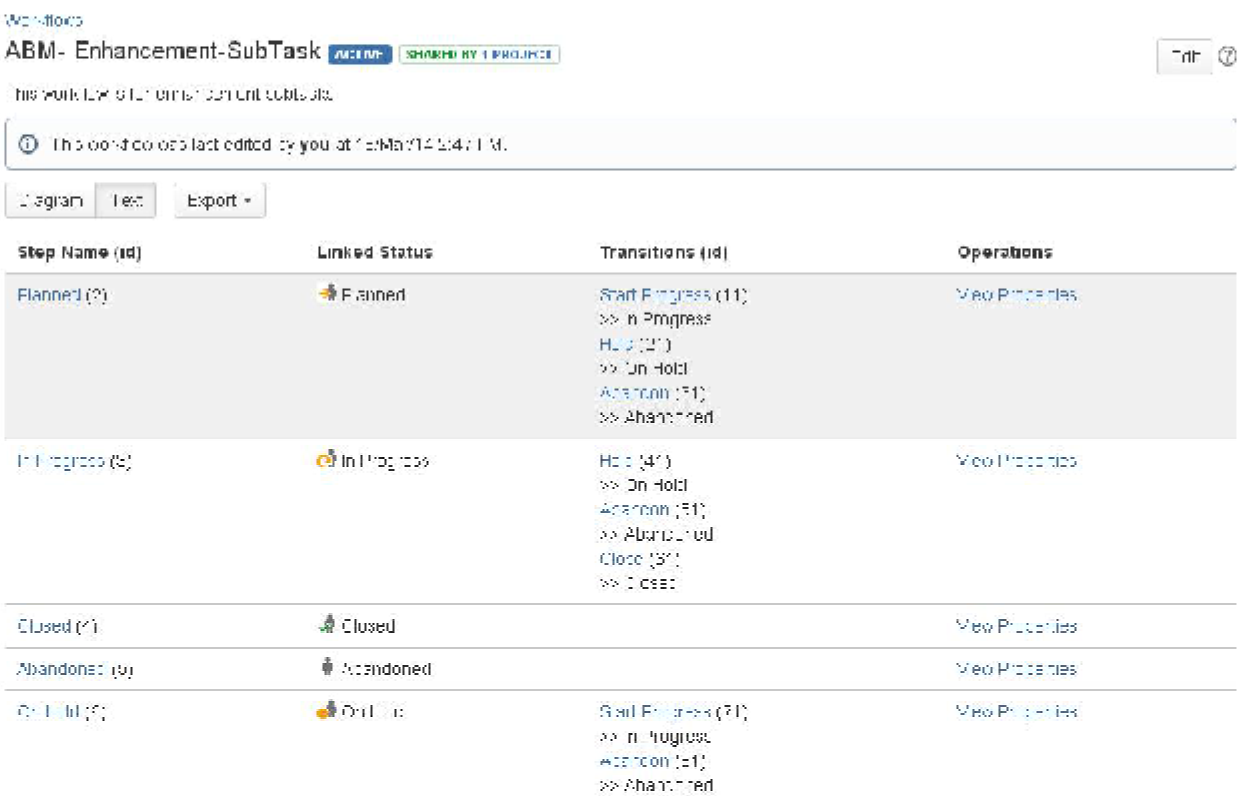
Transition	Conditions	Validators	Post Functions	Transition View
Create Issue (1)	Only users with Create Issues permission can execute this transition.			
Start Progress (11)				ABM_ENH_StartProgress

Hold (21)		Required fields: Remarks		ABM_ENH_HOLD_ABANDON
Abandon (31)		Required fields: Remarks		ABM_ENH_HOLD_ABANDON
Hold (41)		Required fields: Remarks		ABM_ENH_HOLD_ABANDON
Abandon (51)		Required fields: Remarks	The Resolution of issue will be set to Abandoned.	ABM_ENH_HOLD_ABANDON
Close (61)	All sub-tasks must have one of following statuses to allow parent issue transitions: Closed.	Required fields: Actual Size, Units(FP,LOC,complexity)	The Resolution of the issue will be set to Fixed.	ABM_ENH_CLOSE
Start Progress (71)		Required fields: Actual Start Date, Remarks		ABM_ENH_StartProgress
Abandon (81)		Required fields: Remarks	Resolution of issue will be set to Abandoned	ABM_ENH_HOLD_ABANDON



ABM- Enhancement-SubTask

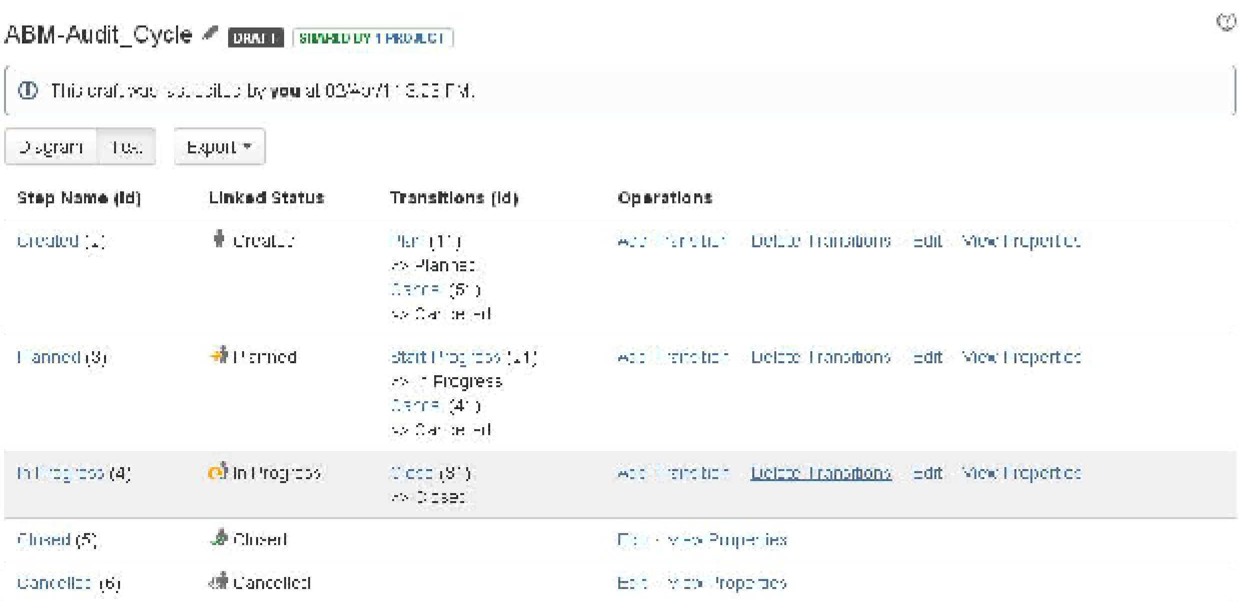
Transition	Conditions	Validators	Post Functions	Transition View
Create Issue (1)	Only users with Create Issues permission can execute this transition.			
Start Progress (11)				ABM_ENH_StartProgress
Hold (21)		Required fields: Remarks		ABM_ENH_HOLD_ABANDON
Abandon (31)		Required fields: Remarks	The Resolution of issue will be set to Abandoned.	ABM_ENH_HOLD_ABANDON
Hold (41)		Required fields: Remarks		ABM_ENH_HOLD_ABANDON
Abandon (51)		Required fields: Remarks	The Resolution of issue will be set to Abandoned.	ABM_ENH_HOLD_ABANDON
Close (61)	All sub-tasks must have one of following statuses to allow parent issue transitions: Closed.	Required fields: Actual Size, Units (FP,LOC, complexity)	The Resolution of the issue will be set to Fixed.	ABM_ENH_CLOSE
Start Progress (71)		Required fields: Actual Start Date, Remarks		ABM_ENH_StartProgress
Abandon (81)		Required fields: Remarks	The Resolution of issue will be set toAbandoned	ABM_ENH_HOLD_ABANDON



ABM-Audit_Cycle

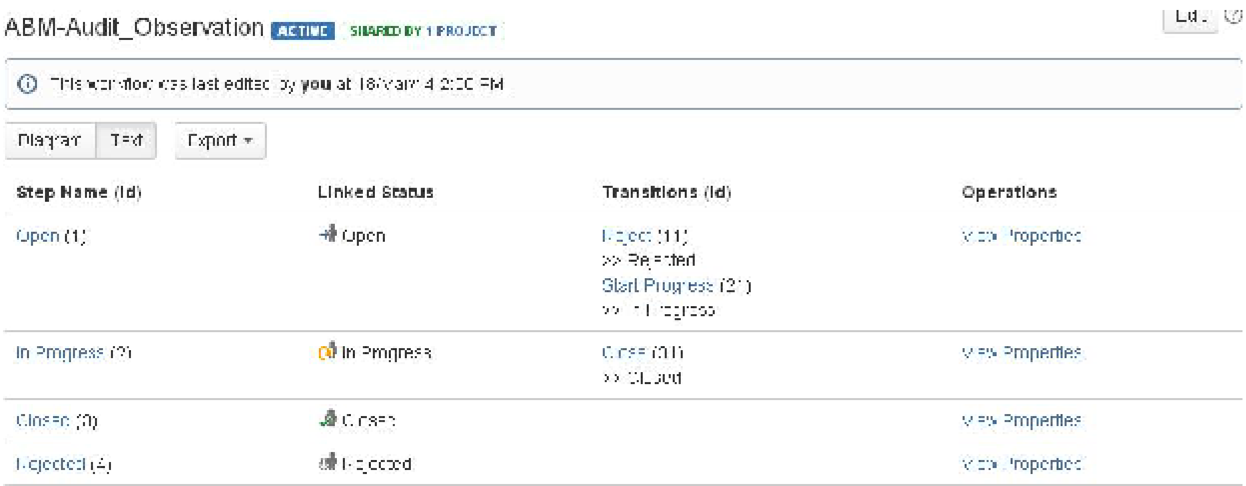
Transition	Conditions	Validators	Post Functions	Transition View
Create Issue (1)	Only users with Create Issues permission can execute this transition			

Plan (11)	Only users in project role Auditor coordinator can execute this transition	Required fields: Remarks		ABM-Adding_UpdatingProjectsToAuditCycle
Cancel (51)	Only users in project role Auditor coordinator can execute this transition			ABM-CancellingAudits
Start Progress (21)	Only users in project role Auditor coordinator can execute this transition			ABM-CancellingAudits
Cancel (41)	Only users in project role Auditor coordinator can execute this transition			ABM-CancellingAudits
Close (31)	Only users in project role Auditor coordinator can execute this transition			ABM-CancellingAudits



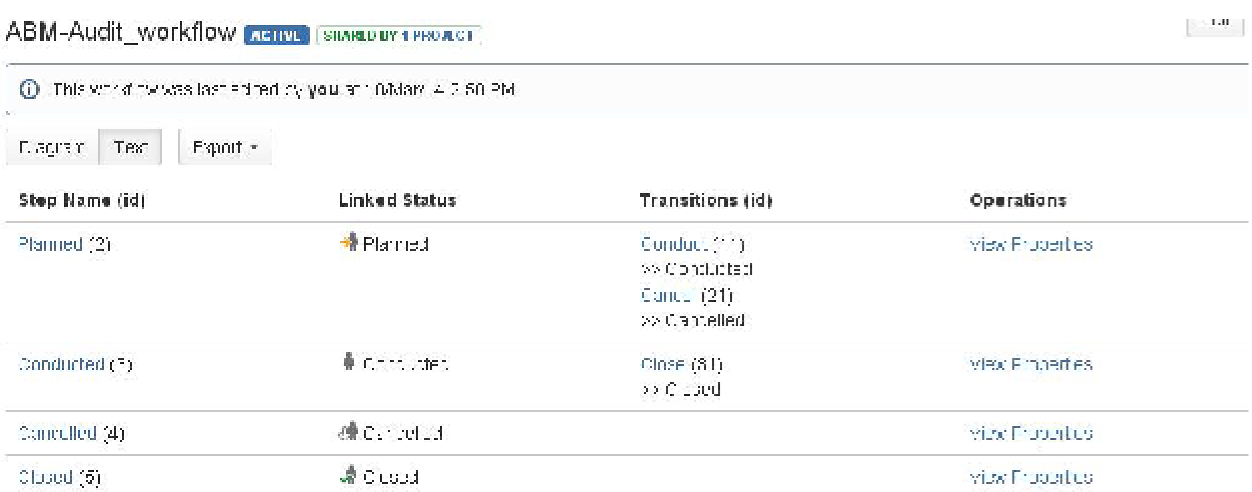
ABM-Audit_Observation

Transition	Conditions	Validators	Post Functions	Transition View
Create Issue (1)	Only users with Create Issues permission can execute this transition			
Reject (11)	Only users in project role Auditee can execute this transition.			ABM-CancellingAudits
Start Progress (21)	Only users in project role Auditee can execute this transition			ABM-UpdatingAuditFindingsForAuditObservations
Close (31)	Only users in project role Auditee can execute this transition.		The Resolution of the issue will be set to Fixed.	ABM-CancellingAudits



ABM-Audit_workflow

Transition	Conditions	Validators	Post Functions	Transition View
Create Issue (1)	Only users with Create Issues permission can execute this transition			
Conduct (11)	Only users in project role Auditor can execute this transition.			ABM-UpdatingAuditFindings
Cancel (21)	Only users in project role Auditor can execute this transition	Required fields: Remarks		ABM-CancellingAudits
Close (31)	Only users in project role Auditor can execute this transition.	Required fields: Remarks	The Resolution of the issue will be set to Fixed.	ABM-CancellingAudits



ABM-DefectManagement

Transition	Conditions	Validators	Post Functions	Transition View
Create Issue (1)	Only users with Create Issues permission can execute this transition			
Start Progress (11)				ABM-DefectStartProgress

	Only assignee of issue can execute this transition.		The Response Time of issue will be set to %% CURRENT_DATETIME%%.	
Not a Defect (61)	Only assignee of issue can execute this transition.			ABM_Only_remark
Fix (101)	Only assignee of issue can execute this transition.			ABM-Defect_Open_fixed
Fix (21)	Only assignee of issue can execute this transition.		The Resolution of the issue will be set to Fixed. The Resolution Time of the issue will be set to %% CURRENT_DATETIME%%.	ABM-Defect_InProg_ToFix
Closure Verification (31)	Only assignee of issue can execute this transition.			ABM_Defect_Fixed_toClosed
Re-Open (51)	Only assignee of issue can execute this transition.			ABM_Ser_CLOSE_OPEN
Start Progress (111)	Only assignee of issue can execute this transition.			ABM-DefectStartProgress
Close (41)	Only assignee of issue can execute this transition.			ABM_Defect_Fixed_toClosed
Re-Open (91)	Only assignee of issue can execute this transition.		The contents of field Resolution will be purged.	ABM_Ser_CLOSE_OPEN
Re-Open (71)	Only assignee of issue can execute this transition.		The contents of field Resolution will be purged.	ABM_Ser_CLOSE_OPEN
Close (81)	Only assignee of issue can execute this transition.			ABM_Only_remark

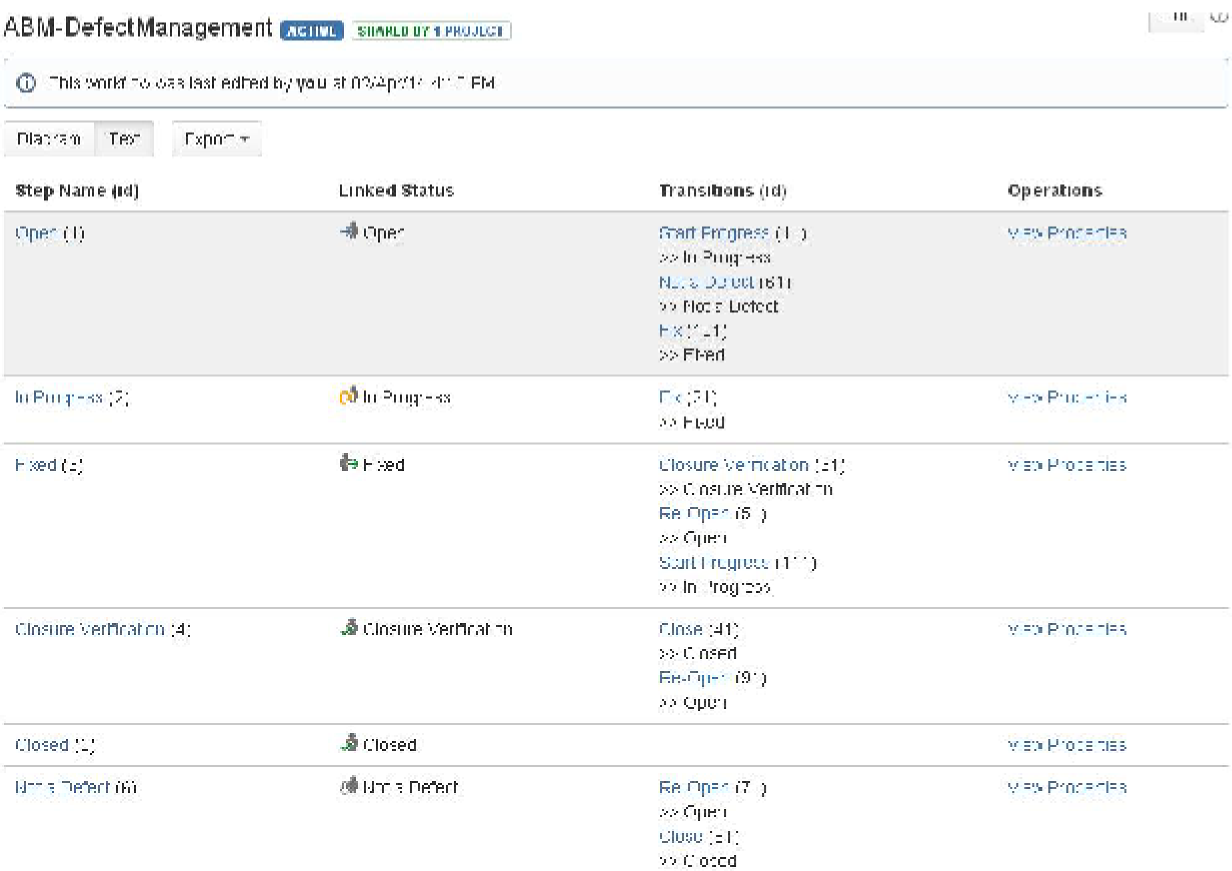
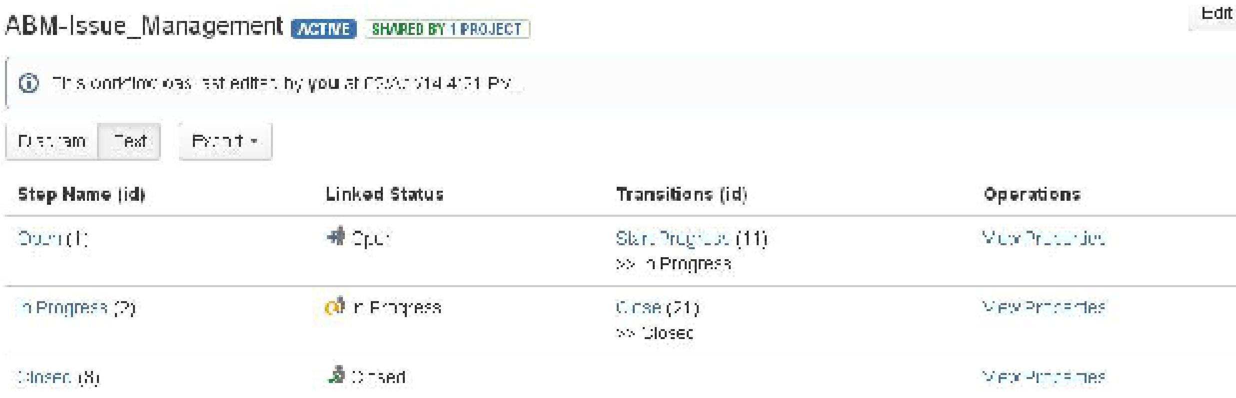

ABM-DefectManagement ACTIVE SHARED BY 1 PROJECT

Diagram Text Export

Step Name (id)	Linked Status	Transitions (id)	Operations
Open (1)	Open	Start Progress (111) >> In Progress Not a Defect (61) >> Not a Defect Fix (101) >> Fixed	View Properties
In Progress (2)	In Progress	Fix (21) >> Fixed	View Properties
Fixed (3)	Fixed	Closure Verification (31) >> Closure Verification Re-Open (51) >> Open Start Progress (111) >> In Progress	View Properties
Closure Verification (4)	Closure Verification	Close (41) >> Closed Re-Open (91) >> Open	View Properties
Closed (5)	Closed		View Properties
Not a Defect (6)	Not a Defect	Re-Open (71) >> Open Close (81) >> Closed	View Properties

ABM-Issue_Management

Transition	Conditions	Validators	Post Functions	Transition View
Create Issue (1)	Only users with Create Issues permission can execute this transition			
Start Progress (11)				ABM-IssueLoggingSheet
Close (21)				ABM-IssueLoggingSheet

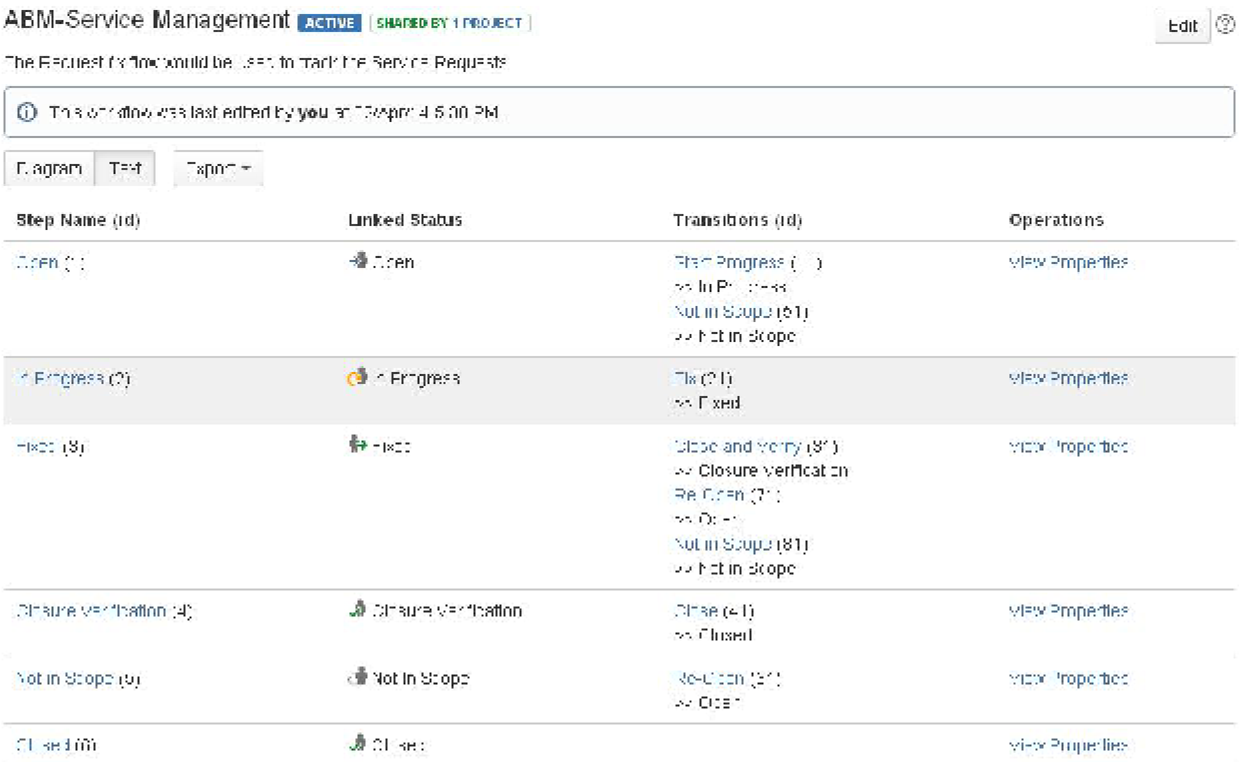


ABM-RIsk_Management

Transition	Conditions	Validators	Post Functions	Transition View
Create Issue (1)	Only users with Create Issues permission can execute this transition			
Close (11)	Only users in project role Project-Manager can execute this transition.			ABM-Risk_update
Update (41)	Only users in project role Project-Manager can execute this transition.		The Date Updated of issue will be set to %% CURRENT_DATETIME%%.	ABM-Risk_update
Close (31)	Only users in project role Project-Manager can execute this transition.			ABM-Risk_update
Re-Open (21)	Only users in project role Project-Manager can execute this transition.		The contents of field Resolution will be purged.	ABM-Risk_update
Close (51)	Only users in project role Project-Manager can execute this transition.		The Resolution of the issue will be set to Fixed.	ABM-Risk_update

ABM-Service Management

Transition	Conditions	Validators	Post Functions	Transition View
Create Issue (1)	Only users with Create Issues permission can execute this transition			
Start Progress (11)	Only assignee of issue can execute this transition.		The Response Time of the issue will be set to %% CURRENT_DATETIME%%	ABM_SER_strt_progress
Not in Scope (51)	Only assignee of issue can execute this transition.			ABM_Ser_CLOSE_OPEN
Fix (21)	Only assignee of issue can execute this transition.		The Resolution of issue will be set to Fixed. The Resolution Time of the issue will be set to %% CURRENT_DATETIME%%.	ABM_Ser_INprog_fix
Close and Verify (31)	Only assignee of issue can execute this transition.			ABM_Ser_CLOSE_OPEN
Re-Open (71)	Only assignee of issue can execute this transition.		The contents of field Resolution will be purged.	ABM_Ser_CLOSE_OPEN
Not in Scope (81)	Only assignee of issue can execute this transition.		The contents of field Resolution will be purged.	ABM_Ser_CLOSE_OPEN
Close (41)	Only assignee of issue can execute this transition.			ABM_Only_remark
Re-Open (61)	Only assignee of issue can execute this transition.		The contents of field Resolution will be purged	ABM_Ser_CLOSE_OPEN



ABM-SQARisk

Transition	Conditions	Validators	Post Functions	Transition View
Create Issue (1)	Only users with Create Issues permission can execute this transition			
Close (11)	Only users in project role SQA can execute this transition.			ABM-SQK_riskUpdate
Update (41)	Only users in project role SQA can execute this transition.	Required fields: Remarks		ABM-Risk_update_Over all
Close (31)	Only users in project role SQA can execute this transition.		The Resolution of the issue will be set to Fixed.	ABM-Risk_update
Re-Open (21)	Only users in project role SQA can execute this transition.		The contents of field Resolution will be purged.	ABM-Risk_update
Close (51)	Only users in project role SQA can execute this transition.		The Resolution of the issue will be set to Fixed.	ABM-Risk_update

Open and Closed issues
Within JIRA (e.g. in the "Assigned to me gadget" and other gadgets), an issue is determined to be **Open** or **Closed** based on the value of its **Resolution** field - not its **Status** field.
An issue is determined to be **Open** if its **Resolution** field has not been set.
An issue is determined to be **Closed** if its **Resolution** field has a value (e.g. **Fixed, Cannot Reproduce**).
This is true regardless of the current value of the issue's **Status** field (**Open, In Progress**, etc).
Therefore, if you need your workflow to force an issue to be **Open** or **Closed**, you will need to set the issue's **Resolution** field during a transition. There are two ways to do this:

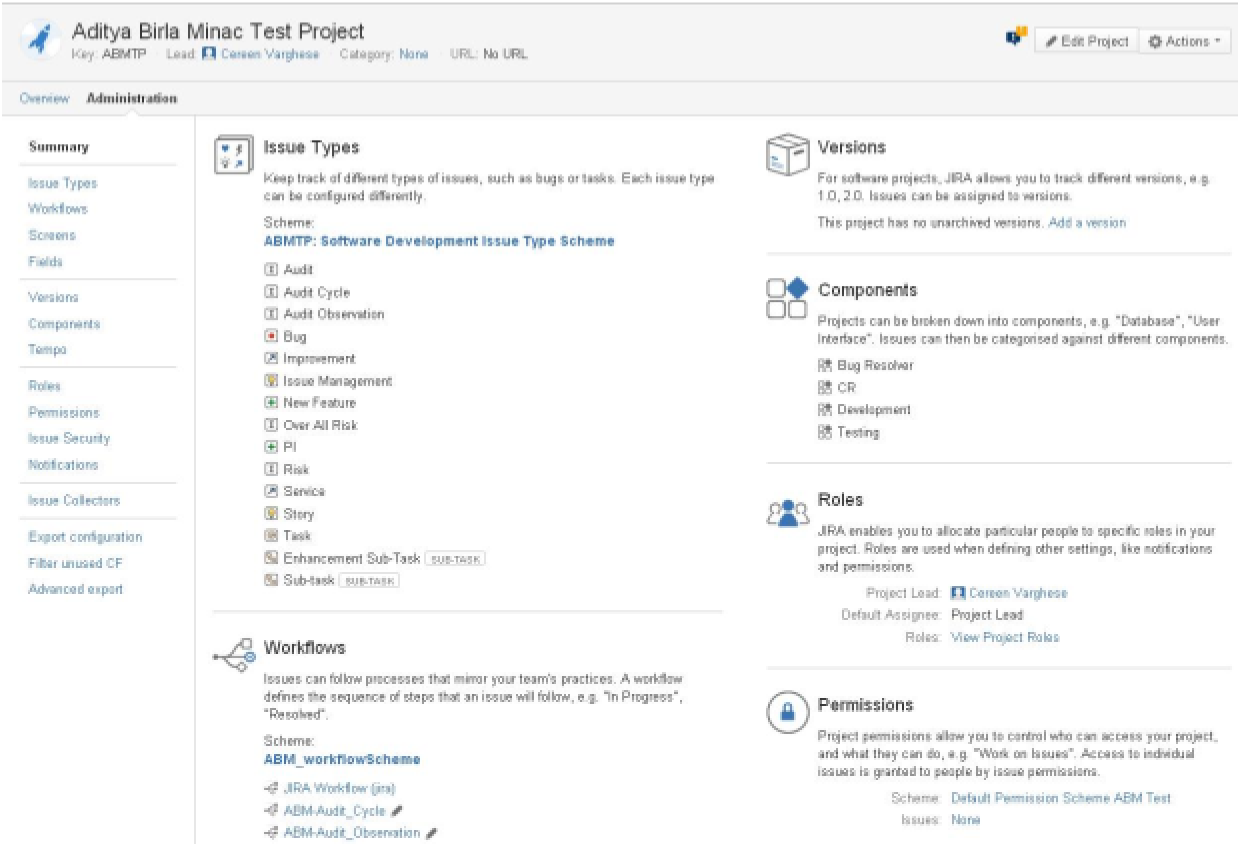
- Set the **Resolution** field automatically via a post function.
- Prompt the user to choose a **Resolution** via a screen

Activating a workflow

1. Log in as a user with the **JIRA Administrator**.
2. Create a workflow scheme or find an existing workflow scheme.
3. Configure the workflow scheme to use your workflow, i.e. add the workflow to the workflow scheme. See Configuring Workflow Schemes for instructions.
4. Associate your workflow scheme with a project, as described in the Associating a workflow scheme with a project section.

Associating a workflow scheme with a project

1. Log in as a user with the **JIRA Administrator**.



2.
3. Choose the **cog icon** at top right of the screen, and then choose **Projects**. The '**Projects Summary**' page is displayed.

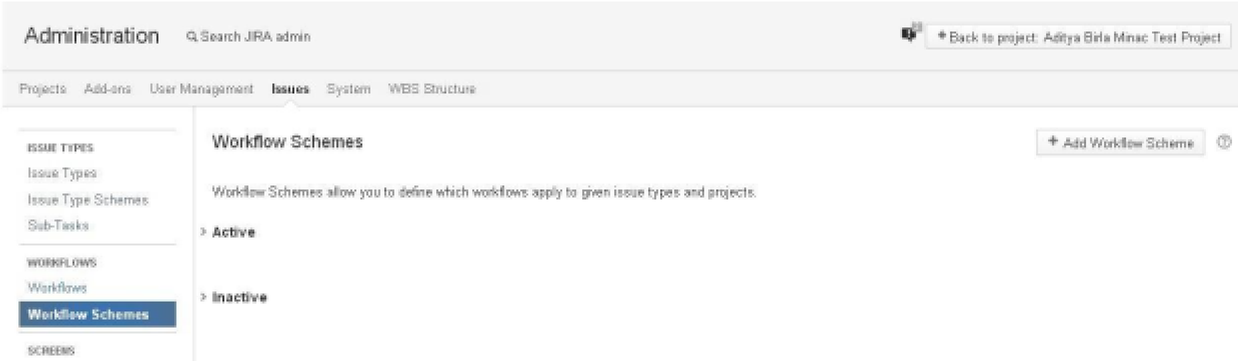
1. Click **Workflows** on the left of the **Project Summary** page. The **Workflows** page is displayed, indicating the current workflow scheme used by the project.
2. Click **Switch Scheme** link to display **Associate Workflow Scheme to Project** page.
3. Select relevant workflow scheme from **Scheme** list and click **Associate** button to begin the migration process.

Each issue has to be in a valid status. The valid statuses for an issue are defined by its workflow. This means that when changing a workflow, you may need to tell JIRA the status for specific issues after the change.
A screen displays that indicates the progress of migrating all the project's issues to the updated scheme's workflows.

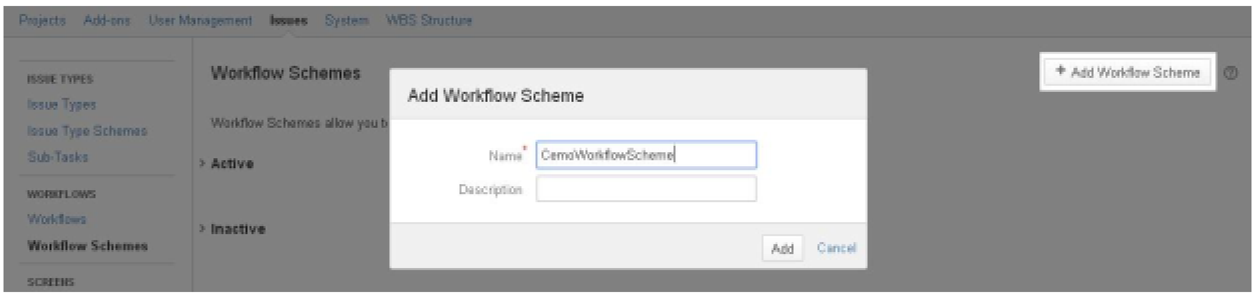
1. Click **Acknowledge** to finish the process. A message displays letting you know that 'your workflows have been published.'

WORKFLOW SCHEMES
A workflow scheme defines a set of associations – or mappings – between a workflow and an issue type. Workflow schemes are associated with a project and make it possible to use a different workflow for every combination of project and issue type.

Adding a workflow scheme

1. Log in as a user with the **JIRA Administrator**.
2. 

3. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select '**Workflow Schemes**' to open the '**Workflow Schemes**' page.

1. Click the **Add Workflow Scheme** button.
2. 

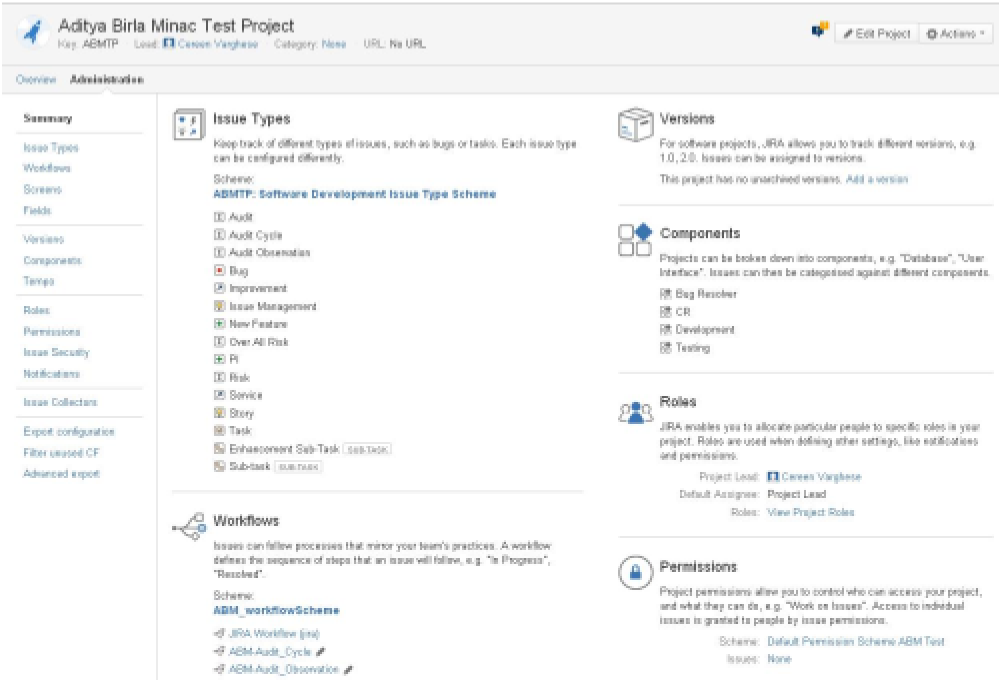
3. Enter the **Name** and **Description** of the new workflow scheme.

1. Click the **Add** button. The new workflow scheme is created.
2. Next to that, configure workflows for a workflow scheme.

Configuring workflows for a workflow scheme

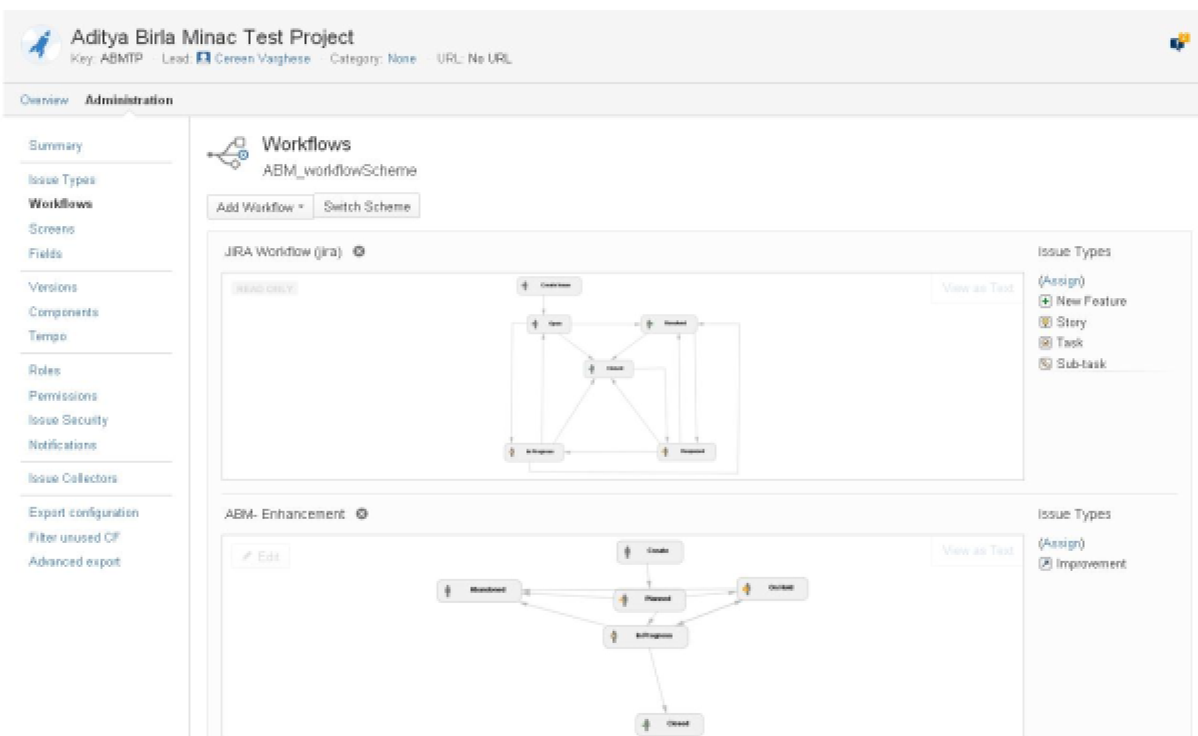
If your scheme is associated with a project, follow the instructions in "**Configuring a workflow scheme associated with a project**". Otherwise, follow the instructions in "**Configuring a workflow scheme outside of a project**".
Configuring a workflow scheme associated with a project

1. Log in as a user with the **JIRA Administrator**.



2.

3. Choose the **cog icon** at top right of the screen, and then choose **Projects**.



1.

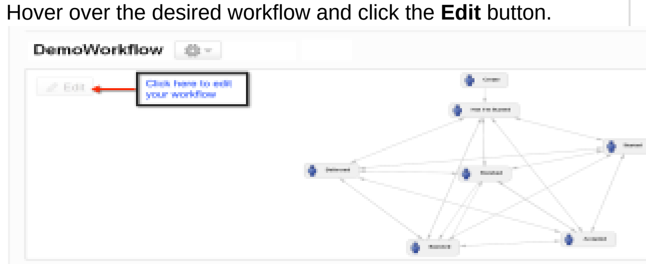
2. Click **Workflows** on left of **Project Summary** page. The **Workflows** page is displayed, indicating current workflow scheme used by the project.

1. 

Configure the issue types for the workflow scheme as desired.

This is not the same as editing the workflow (Clicking the **Edit** button in the workflow diagram at the center of your screen). If you do that you will be asked to publish your *draft workflow scheme*.

1. Click **Associate** to begin the migration process. Each issue has to be in a valid status. The valid statuses for an issue are defined by its workflow. This means that when changing a workflow, you may need to tell JIRA the status for specific issues after the change.
2. A screen displays that indicates the progress of migrating all the project's issues to the updated scheme's workflows.
3. Click **Acknowledge** to finish the process. A message displays letting you know that 'your workflows have been published.'

Add a workflow to the scheme	Click Add Workflow & select 'Choose From Marketplace' or 'Add Existing'. [Choose from Marketplace lets you import a workflow from the Atlassian Marketplace.] Select the desired workflow and issue types.
Edit a workflow	Hover over the desired workflow and click the **Edit** button.  **Note: Edit** button only displays if you have edit permission. You can only edit system workflow if you are viewing it in JIRA's default workflow scheme.
Remove a workflow from scheme	Click cog icon for desired workflow and select **Remove this workflow**.
Change issue type associated with workflow	1. Click the **Assign** link under **Issue Types** for the desired workflow.2. Select the desired issue types in the dialog that appears.3. Click **Finish**.
View the text-based representation of a workflow	Hover over the desired workflow and click the **View as Text** link.
Change workflow scheme associated with project	Click the **Switch Scheme** button next to the scheme name.

Configuring a workflow scheme outside of a project
You can use this procedure to edit any workflow scheme in the system, including those shared by multiple projects. The workflow scheme can be either active or inactive.
Before you begin:
If your workflow scheme is associated with a project, you may want to follow the instructions above instead. When a workflow scheme is used by more than one project, you must use this configuration method.
When a workflow scheme is active, it creates a 'draft workflow scheme' when you edit it.
To configure the workflow scheme that is not associated with a project:

4. Log in as a user with the **JIRA Administrator**.
5. Choose the **cog icon**  at top right of the screen, and then choose **Issues**. Select **Workflow Schemes** to open the 'Workflow Schemes' page.
6. Click the **Edit** link under the **Operations** column for the desired workflow.

7. Edit your workflow scheme as described in the table below.
8. If your workflow is active, you need to publish it to make your changes active.

Add a workflow to the scheme	1. Click Add Workflow and select 'Choose From Marketplace' or 'Add Existing'. [Choose from Marketplace lets you import a workflow from the Atlassian Marketplace.] 2. Select the desired workflow and issue types.
Remove a workflow from the scheme	Click the Remove link in the Operations column.
Change the issue types associated with a workflow	1. Click the Assign link under Issue Types for the desired workflow. 2. Select the desired issue types in the dialog that appears.3. Click Finish.
View representation of a workflow	Click either the Text or Diagram link next to the Workflow name.
Remove issue type from scheme	Click the x next to the name of the issue type to remove it.

Editing, copying, and deleting workflow schemes

1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, & then choose **Issues**. Select **Workflow Schemes** to open the 'Workflow Schemes' page

Edit the name and description of a workflow scheme	Click the **Edit** link. Use inline edit mode – click in the associated field – to update the name and description.
Copy a workflow scheme	Click the **Copy** link. A copy of workflow scheme is created with prefix 'Copy of (name of current workflow)' and placed in inactive workflow schemes.
Delete a workflow scheme	Click the **Delete** link and confirm the deletion. You cannot delete an active workflow scheme. You must first disassociate it from all projects.

Following **Workflow Schemes** have been created for **ABM JIRA** configuration,

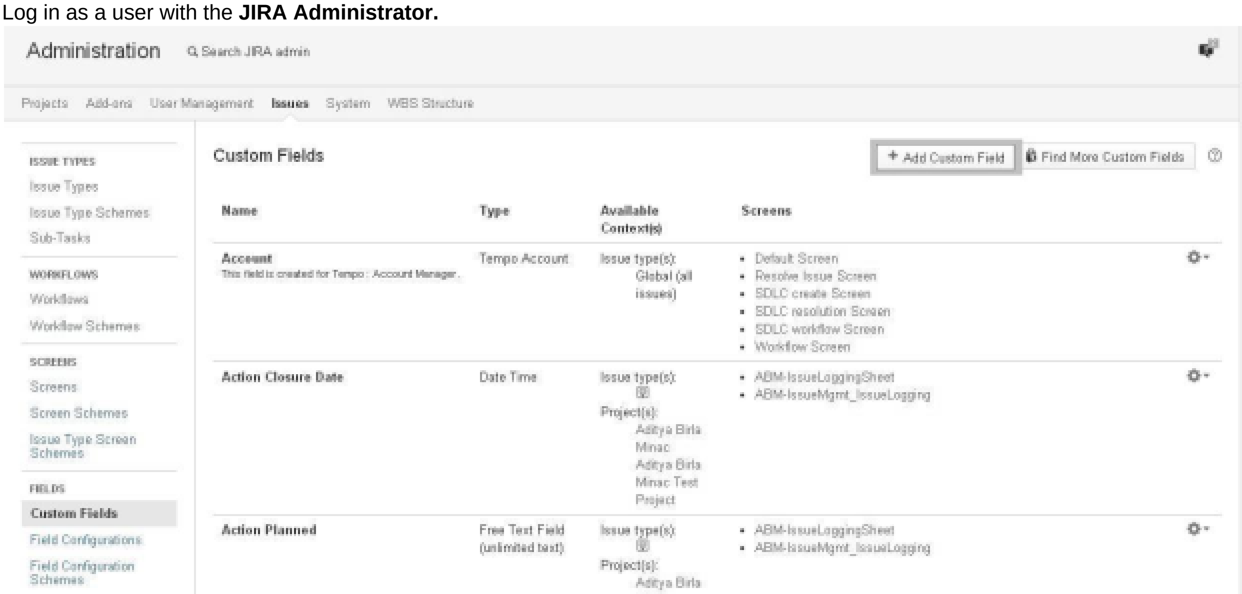
Workflow Scheme Name	Project Name	Issue Type	Workflow
ABM_workflowScheme	Aditya Birla Minac Test Project	Unassigned Types	Jira
		Audit	ABM-Audit_workflow
		Audit Cycle	ABM-Audit_Cycle
		Audit Observation	ABM-Audit_Observation
		Bug	ABM-DefectManagement
		Improvement	ABM- Enhancement
		Enhancement Sub-Task	ABM- Enhancement-SubTask
		Issue Management	ABM-Issue_Management
		Risk	ABM-RIsk_Management
		Over All Risk	ABM-SQARisk

		PI	ABM-PIFlow
		Service	ABM-Service Management

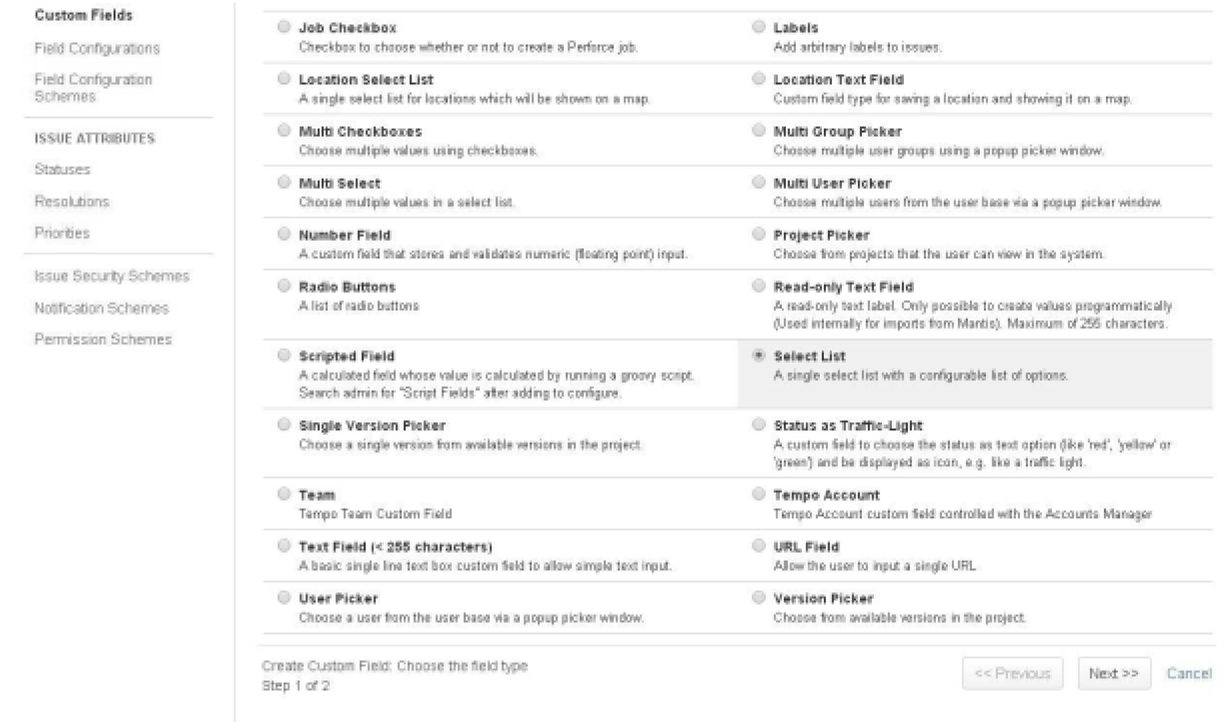
Using Validators with Custom Fields
Use the 'Fields Required' workflow validator that is packaged in the JIRA Suite Utilities.
Please note the following caveats regarding validation of data by the 'Fields Required' workflow validator at the time of issue creation:

- fields that you set up as "required fields" are not flagged as such in form to the end-user
- such fields can be cleared at a later time, which is not what you may have intended
- plugins such as JIRA Agile will not detect the requirement as implemented by the workflow validator, so may fail later during usage

The reason 3rd party tools are needed is because JIRA's interpretation of "required" from a project's Field Configuration on some custom field means that the field is now required across all screens available to that project, regardless if the screen doesn't actually display that particular field. 3rd party tools, like the JIRA Suite Utilities' 'Fields Required' validator, are effectively a more granular means to control fields at the step or screen level at a project, instead of at the project level by the Project's Field Configuration.
CUSTOM FIELDS
How to create a new custom field, associate it with a context, and add it to a screen:

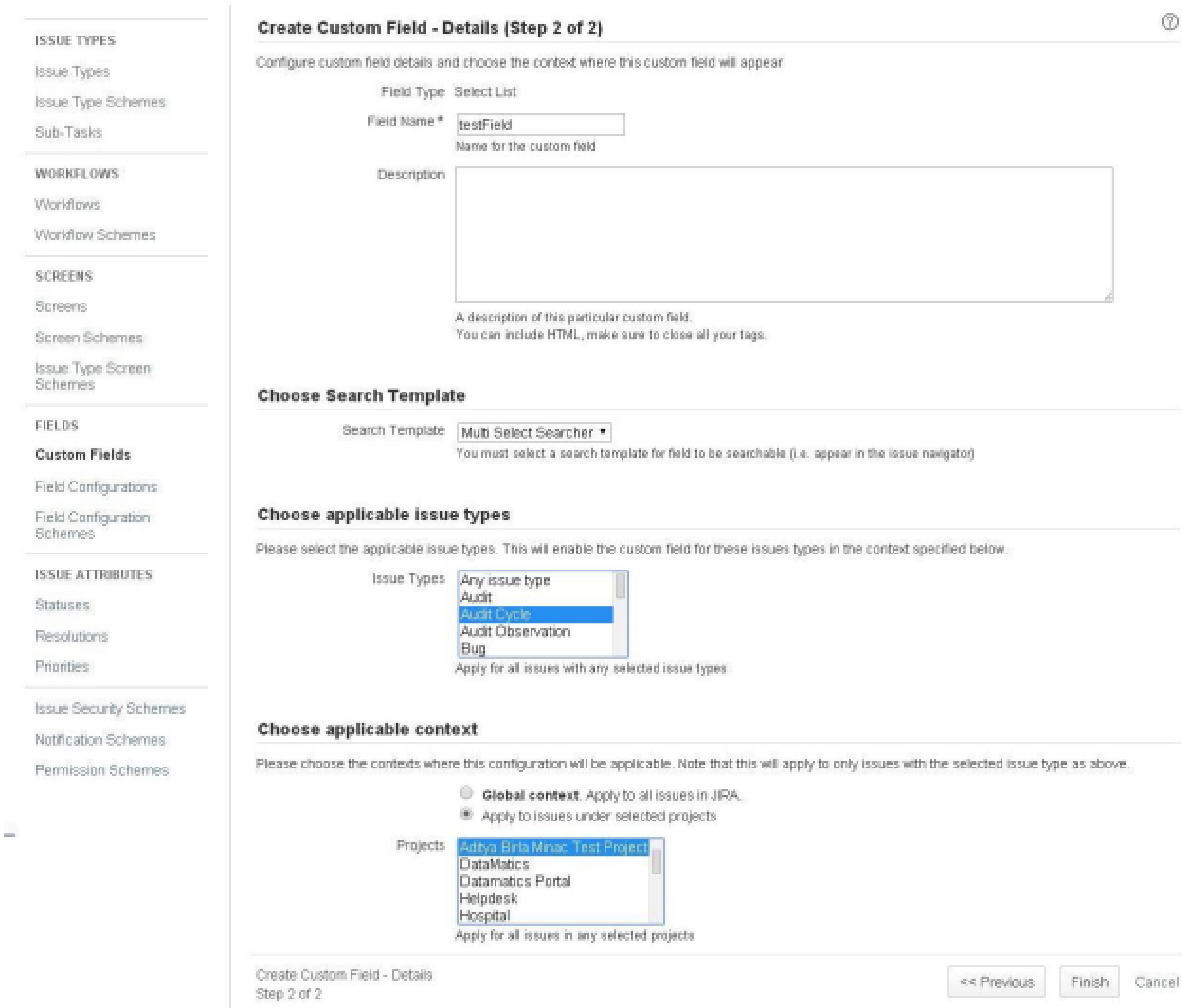
1. Log in as a user with the **JIRA Administrator.**


2.
3. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Fields > Custom Fields** to open the 'Custom Fields' page.



1.
2. Click the **Add Custom Field** button on to open the **Create Custom Field: Choose the field type (Step 1 of 2)** page.

1. Select the appropriate type of field for your custom field.



2.
3. Click the **Next** button to open the **Create Custom Field - Details (Step 2 of 2)** page.

1. Complete the **Field Name** (custom field's title) and **Field Description**.
2. Select an appropriate **Search Template**. Pre-configured search templates are available for each shipped custom field type.
3. Select one or any number of '**Issue Types**' to which this custom field will be available. Alternatively, select '**Any issue type**' to make the custom field available to all Issue Types.
4. Select the applicable context, that is, the **'Project(s)'** to which the custom field will be available. Alternatively, select **'Global context**' to make the custom field available to all projects.
    - If issue types were chosen, the custom field will only appear for those issue types for the selected project(s).

1. 

2. Click the '**Finish**' button. This will bring you to the screen association page:

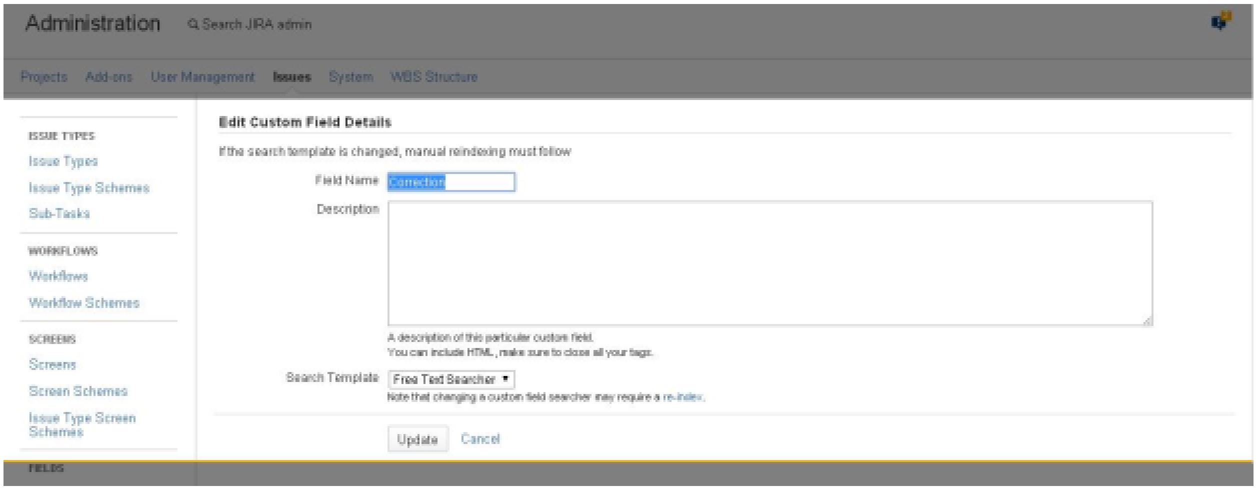
1. Select a screen, or screen tab, on which to display your newly created custom field. You must associate a field with a screen before it will be displayed. New fields will be added to the end of a tab.
2. Click the '**Update**' button. You will return you to the View Custom Fields page, which displays a summary of all custom fields in JIRA system.
3. You can **edit**, **delete** or **configure** custom fields here. This page is also directly accessible from the menu bar to the left of all Administration pages.

Editing a Custom Field Details

Editing a custom field allows you to change its Name (label), Description (Help text) and Search Template.

1. Log in as a user with the **JIRA Administrator.**
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Fields > Custom Fields** to open the 'Custom Fields' page.
3. 

4. Locate the relevant custom field and choose **cog icon > Edit**.



1. Locate the relevant custom field and choose **cog icon > Edit**.
2. Modify the desired fields and click on **Update**.

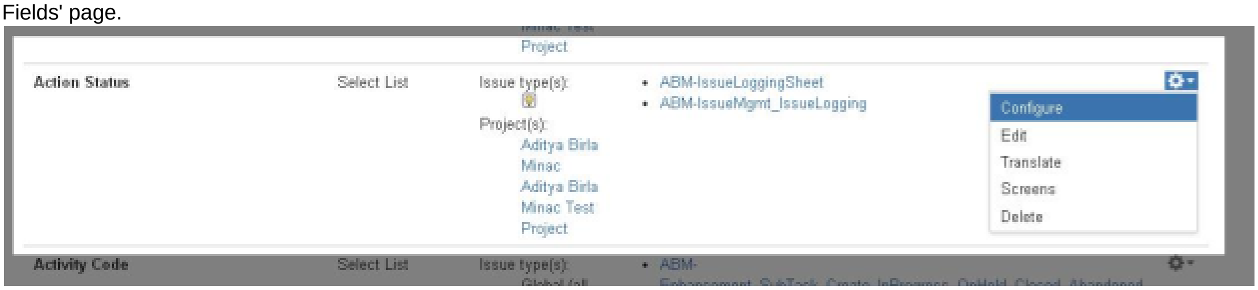
Fields	Use
Name	Name is the label that appears to the left of the custom field when it is displayed to a user.
Description	Description is the Help text that appears below the custom field when it is displayed in the Simple Search column.
Search Templates	Search Templates are responsible for indexing a custom field as well as making it searchable via Simple Search & Advanced Search NOTE: Custom fields are not searchable via Quick Search.

3. Note that changing a custom field searcher may require a **re-indexing**.

Configuring a Custom field

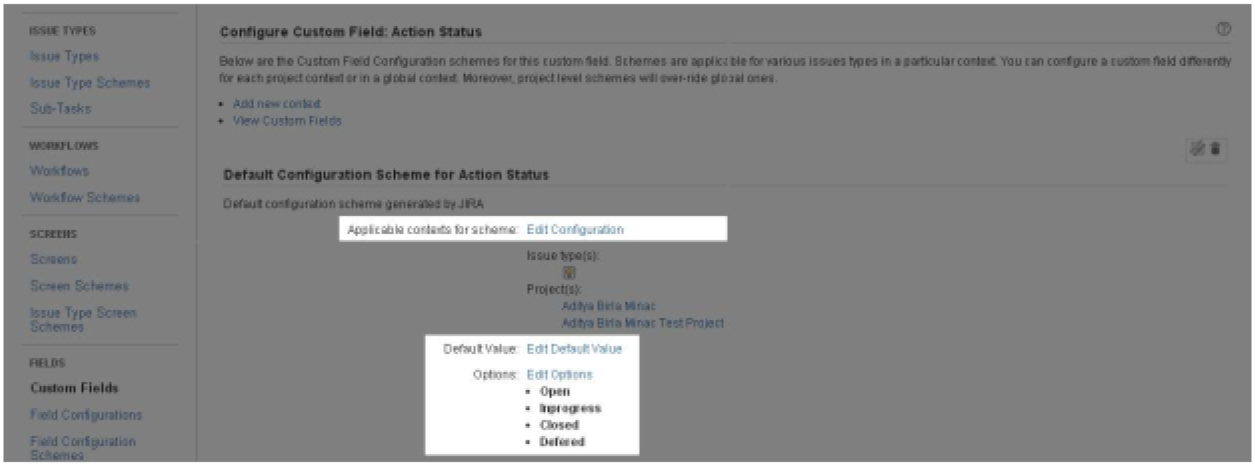
A *custom field context* (also known as a *custom field configuration scheme*[1]) specifies the Default Value and Options for the custom field, and the issue types and projects to which the Default Value and Options will apply. You can create multiple contexts if you need to associate different Default Values and Options with particular projects or issue types.

To change the project(s) and issue type(s) for which a given 'Default Value' and 'Options' will apply:

1. Log in as a user with the **JIRA Administrator.**
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Fields > Custom Fields** to open the 'Custom Fields' page.
3. 

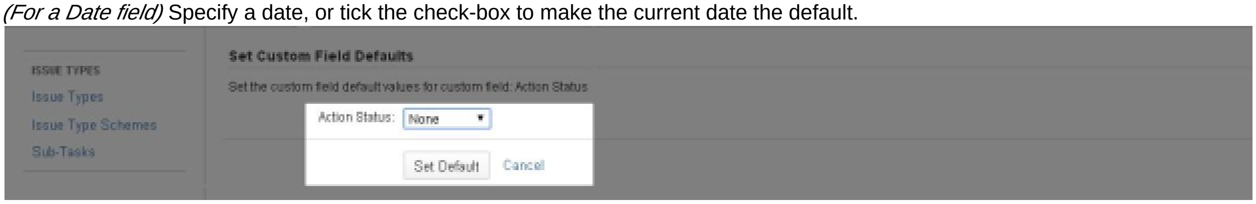
4. Locate the relevant custom field and choose **cog icon > Configure**.

1. Locate the relevant context (there will usually only is one, named 'Default Configuration Scheme for ...') and click the **Edit Configuration** link.
2. Under 'Choose applicable issue types', select the issue type(s) to which you want this Default Value and Options to apply. You can select **any issue types** if you wish.

3. 

4. Under 'Choose applicable contexts', select the project(s) to which you want this Default Value and Options to apply. Note that this will apply to only issues with the selected issue type(s) as above.

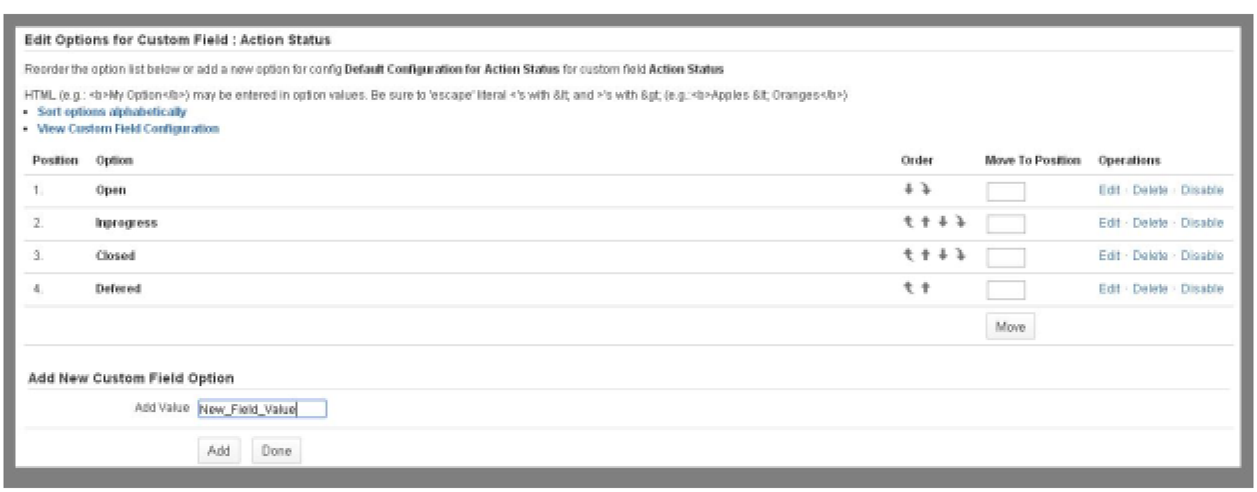
1. The '**Set Custom Field Defaults**' page will display particular to the custom field type:

- *(For a Select List or Multi-Select List)* Select the appropriate default value from the drop-down list.
- *(For a Cascading Select List)* Select the appropriate default values from the drop-down lists (one for each level).
- *(For a Date field)* Specify a date, or tick the check-box to make the current date the default.
- 

- *(For other types of fields)* Type the appropriate default values from the drop-down lists (one for each level).

1. The 'Edit Custom Field Options' page will display:

- Select from the **Edit parent select list** drop-down to choose which list to edit. *(For a Cascading Select List only)*
- Click **Sort alphabetically** to automatically re-order the options alphabetically.
- Click the arrows in the **Order** column, or specify a number and click the **Move** button, to re-order the options manually.
- Click **Edit** to change the text of an option.
- Click **Disable** to hide an option so that it is no longer available for selection. Options that have been used cannot be removed (to preserve data integrity), but due to changing business requirements, they may become invalid over time and so you may wish to make them unavailable for new issues.
- Click **Delete** to remove an option. (This will only be possible for options that have not been used.)



1. Click on '**Add'**, and then Click on '**Done'** after adding desired number of field values.

Creation of **Free Text** Custom Field

1. Log in as a user with the **JIRA Administrator.**
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Fields > Custom Fields** to open the 'Custom Fields' page.
3. 

4. Click the **Add Custom Field** button on to open the **Create Custom Field: Choose the field type (Step 1 of 2)** page.

1. Select the **Free Text** type of field for new custom field.
2. 

3. Click the **Next** button to open the **Create Custom Field - Details (Step 2 of 2)** page.

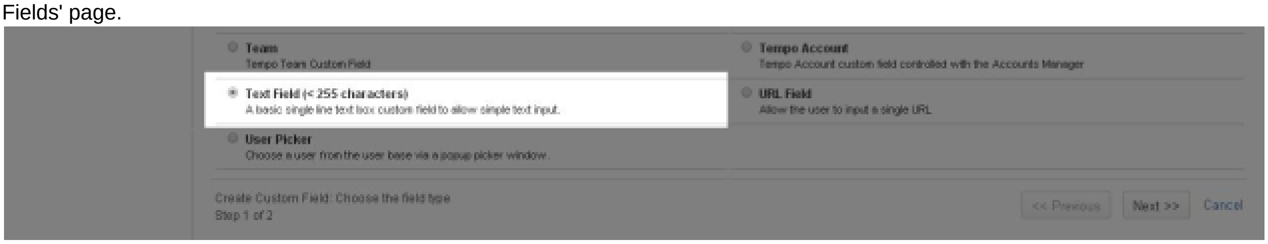
1. Complete the **Field Name** (custom field's title) and **Field Description**.
2. Select one or any number of '**Issue Types**' to which this custom field will be available. Alternatively, select '**Any issue type**' to make the custom field available to all Issue Types.
3. Select the applicable context, that is, the **'Project(s)'** to which the custom field will be available. Alternatively, select **'Global context**' to make the custom field available to all projects.

4. 

5. Click the '**Finish**' button. This will bring you to the screen association page:

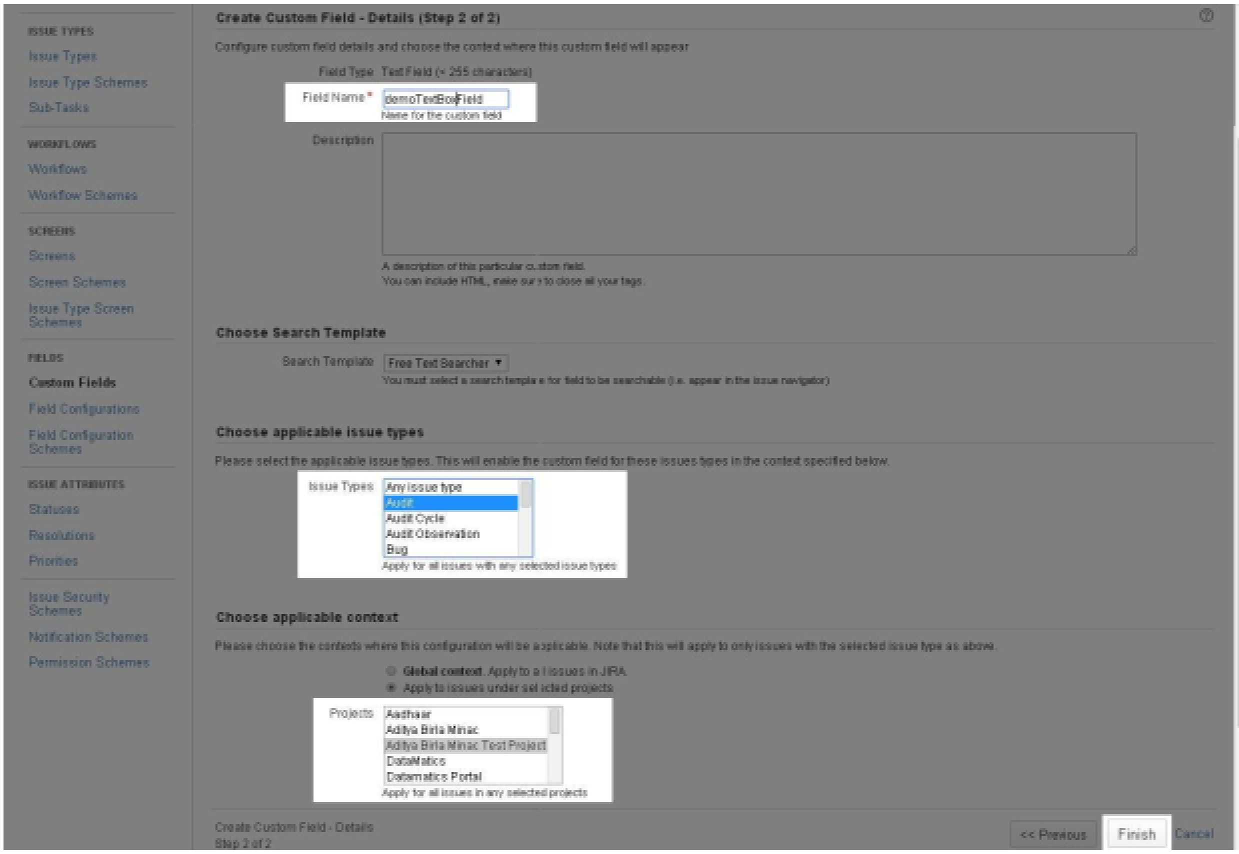
1. Select a screen, or screen tab, on which to display your newly created custom field. You must associate a field with a screen before it will be displayed. New fields will be added to the end of a tab.
2. Click the '**Update**' button. You will return you to the View Custom Fields page, which displays a summary of all custom fields in JIRA system.
3. You can **edit**, **delete** or **configure** custom fields here. This page is also directly accessible from the menu bar to the left of all Administration pages.

Creation of **Text Box** Custom Field

1. Log in as a user with the **JIRA Administrator.**
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Fields > Custom Fields** to open the 'Custom Fields' page.
3. 

4. Click the **Add Custom Field** button on to open the **Create Custom Field: Choose the field type (Step 1 of 2)** page.

1. Select the **Free Text** type of field for new custom field.

2. 

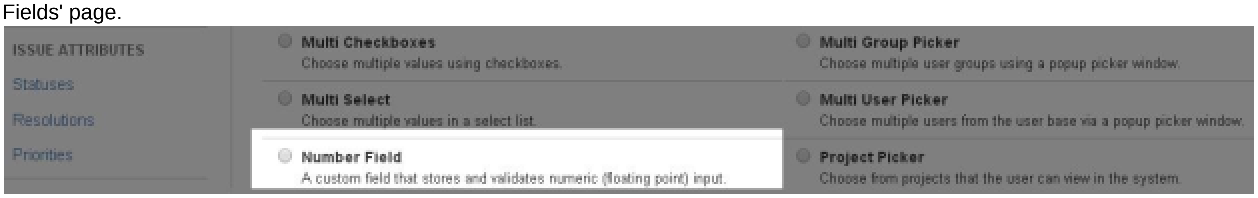
3. Click the **Next** button to open the **Create Custom Field - Details (Step 2 of 2)** page.

1. Complete the **Field Name** (custom field's title) and **Field Description**.
2. Select one or any number of '**Issue Types**' to which this custom field will be available. Alternatively, select '**Any issue type**' to make the custom field available to all Issue Types.
3. Select the applicable context, that is, the **'Project(s)'** to which the custom field will be available. Alternatively, select **'Global context**' to make the custom field available to all projects.
4. 

5. Click the '**Finish**' button. This will bring you to the screen association page:

1. Select a screen, or screen tab, on which to display your newly created custom field. You must associate a field with a screen before it will be displayed. New fields will be added to the end of a tab.
2. Click the '**Update**' button. You will return you to the View Custom Fields page, which displays a summary of all custom fields in JIRA system.
3. You can **edit**, **delete** or **configure** custom fields here. This page is also directly accessible from the menu bar to the left of all Administration pages.

Creation of **Number Field** Custom Field

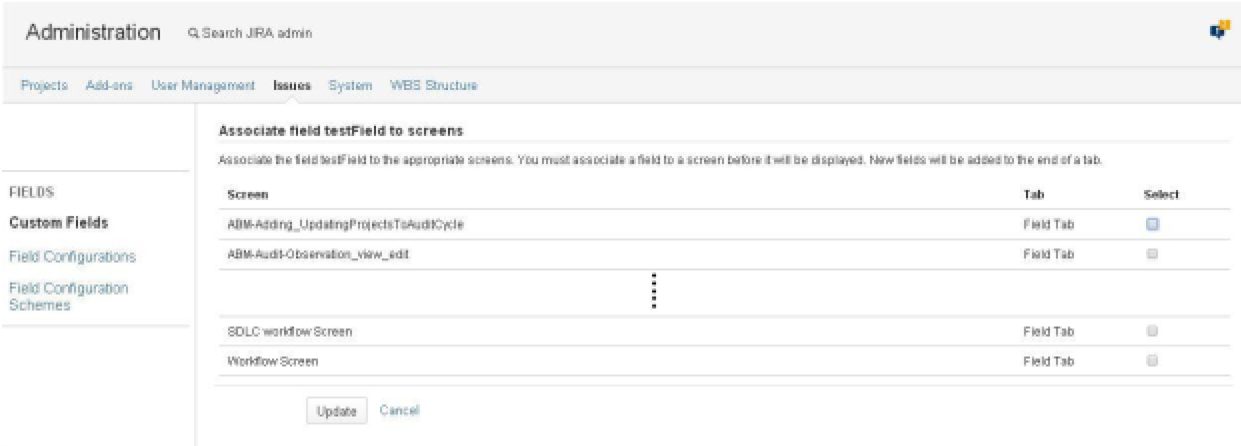
1. Log in as a user with the **JIRA Administrator.**
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Fields > Custom Fields** to open the 'Custom Fields' page.
3. 

4. Click the **Add Custom Field** button on to open the **Create Custom Field: Choose the field type (Step 1 of 2)** page.

1. Select the **Number Field** type of field for new custom field.
2. 

3. Click the **Next** button to open the **Create Custom Field - Details (Step 2 of 2)** page.

1. Complete the **Field Name** (custom field's title) and **Field Description**.
2. Select one or any number of '**Issue Types**' to which this custom field will be available. Alternatively, select '**Any issue type**' to make the custom field available to all Issue Types.

3. Select the applicable context, that is, the **'Project(s)**' to which the custom field will be available. Alternatively, select **'Global context**' to make the custom field available to all projects.
4. 

5. Click the '**Finish**' button. This will bring you to the screen association page:

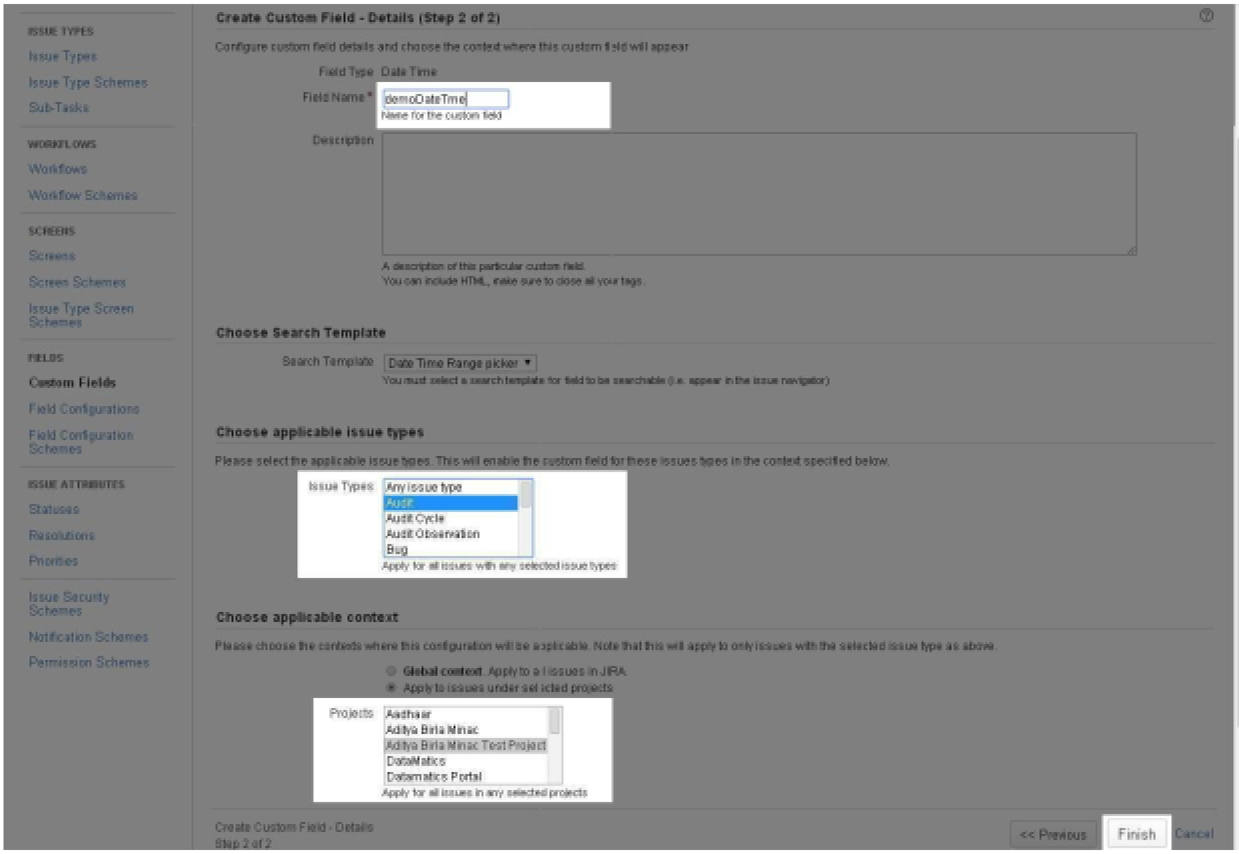
1. Select a screen, or screen tab, on which to display your newly created custom field. You must associate a field with a screen before it will be displayed. New fields will be added to the end of a tab.
2. Click the '**Update**' button. You will return you to the View Custom Fields page, which displays a summary of all custom fields in JIRA system.
3. You can **edit**, **delete** or **configure** custom fields here. This page is also directly accessible from the menu bar to the left of all Administration pages.

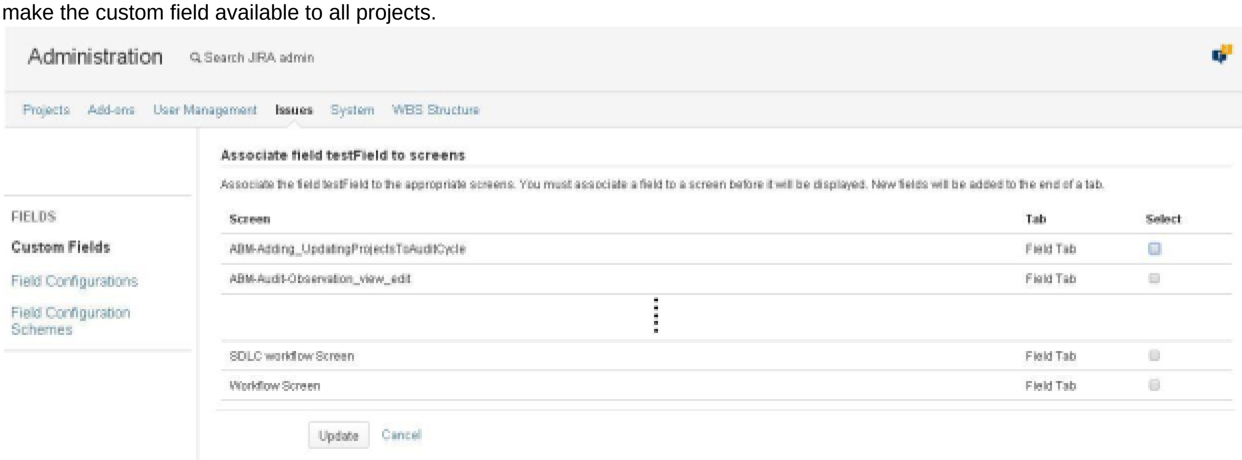
Creation of **Date Time** Custom Field

1. Log in as a user with the **JIRA Administrator.**
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Fields > Custom Fields** to open the 'Custom Fields' page.
3. 

4. Click the **Add Custom Field** button on to open the **Create Custom Field: Choose the field type (Step 1 of 2)** page.

1. Select the **Date Time** type of field for new custom field.
2. Click the **Next** button to open the **Create Custom Field - Details (Step 2 of 2)** page.



1. Complete the **Field Name** (custom field's title) and **Field Description**.
2. Select one or any number of '**Issue Types**' to which this custom field will be available. Alternatively, select '**Any issue type**' to make the custom field available to all Issue Types.
3. Select the applicable context, that is, the **'Project(s)'** to which the custom field will be available. Alternatively, select **'Global context**' to make the custom field available to all projects.
4. 

5. Click the '**Finish**' button. This will bring you to the screen association page:

1. Select a screen, or screen tab, on which to display your newly created custom field. You must associate a field with a screen before it will be displayed. New fields will be added to the end of a tab.
2. Click the '**Update**' button. You will return you to the View Custom Fields page, which displays a summary of all custom fields in JIRA system.

3. You can **edit**, **delete** or **configure** custom fields here. This page is also directly accessible from the menu bar to the left of all Administration pages.

Creation of **Radio Button** Custom Field

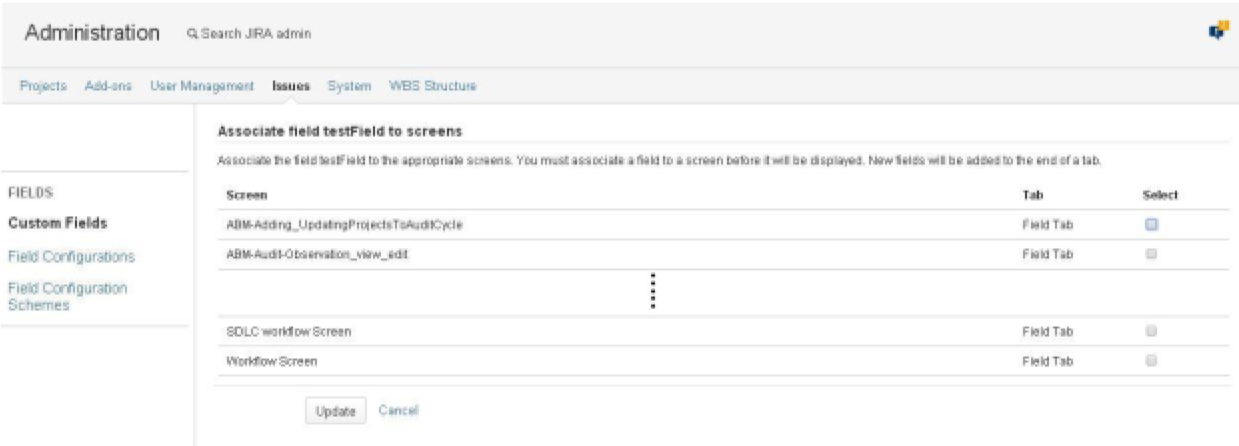
1. Log in as a user with the **JIRA Administrator.**
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Fields > Custom Fields** to open the 'Custom Fields' page.
3. 

4. Click the **Add Custom Field** button on to open the **Create Custom Field: Choose the field type (Step 1 of 2)** page.

1. Select the **Radio Button** type of field for new custom field.
2. 

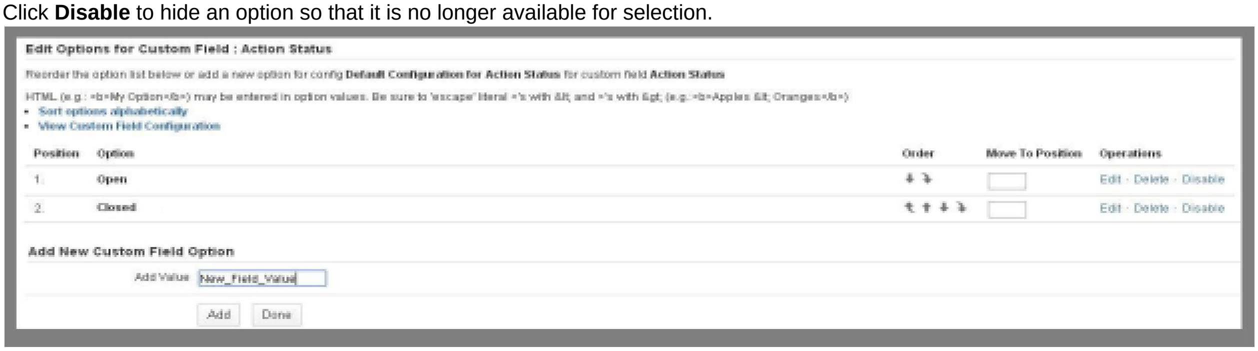
3. Click the **Next** button to open the **Create Custom Field - Details (Step 2 of 2)** page.

1. Complete the **Field Name** (custom field's title) and **Field Description**.
2. Select one or any number of '**Issue Types**' to which this custom field will be available. Alternatively, select '**Any issue type**' to make the custom field available to all Issue Types.
3. Select the applicable context, that is, the **'Project(s)'** to which the custom field will be available. Alternatively, select **'Global context**' to make the custom field available to all projects.



4.
5. Click the '**Finish**' button. This will bring you to the screen association page:

1. Select a screen, or screen tab, on which to display your newly created custom field. You must associate a field with a screen before it will be displayed. New fields will be added to the end of a tab.
2. Click the '**Update**' button. You will return you to the View Custom Fields page, which displays a summary of all custom fields in JIRA system.
3. For **Radio Button** custom field, various field values needed to be specified, to specify these field values locate the relevant custom field and choose **cog icon > Configure**.
4. Locate the relevant context (there will usually only is one, named 'Default Configuration Scheme for ...') and click the **Edit Options** link.
5. The 'Edit Custom Field Options' page will display:

- Click **Sort alphabetically** to automatically re-order the options alphabetically.
- Click the arrows in the **Order** column, or specify a number and click the **Move** button, to re-order the options manually.
- Click **Edit** to change the text of an option.
- Click **Disable** to hide an option so that it is no longer available for selection.
- 

- Click **Delete** to remove an option.

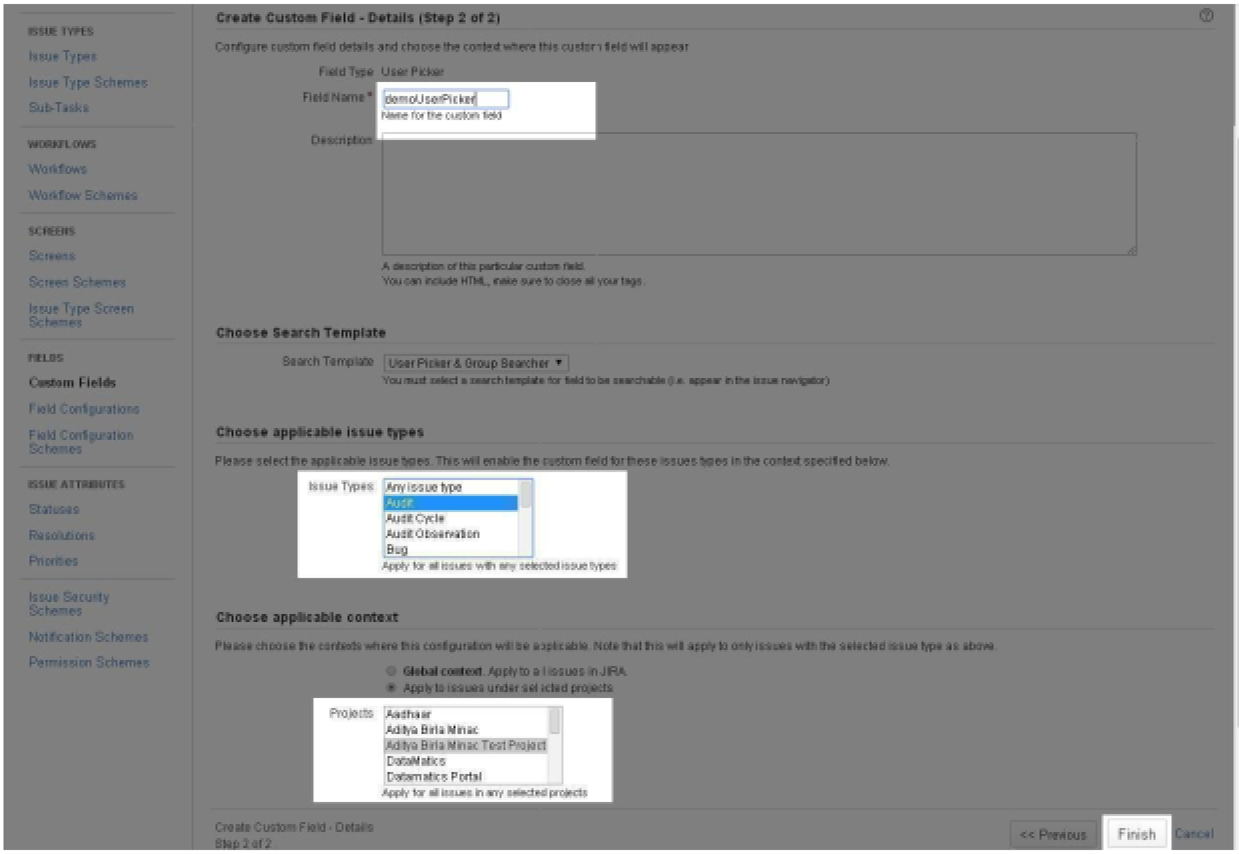
1. To add new field value, enter new field value in **add value** text box located under **add new custom field option** section, after adding field value, click on '**Add'**, and then Click on '**Done'** after adding desired number of field values.

Creation of **User Picker** Custom Field

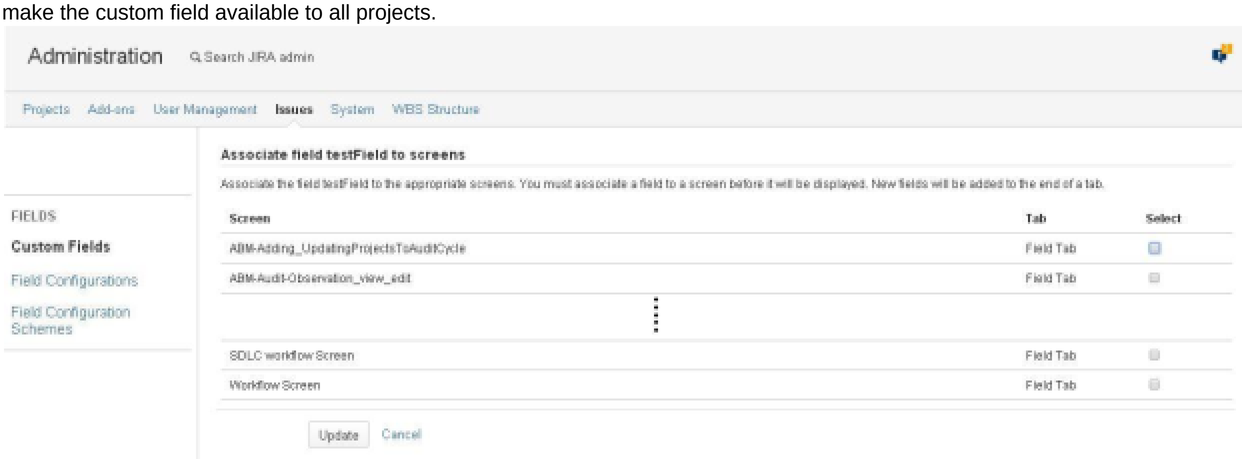
1. Log in as a user with the **JIRA Administrator.**
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Fields > Custom Fields** to open the 'Custom Fields' page.
3. 

4. Click the **Add Custom Field** button on to open the **Create Custom Field: Choose the field type (Step 1 of 2)** page.

1. Select the **User Picker** type of field for new custom field.

2. 

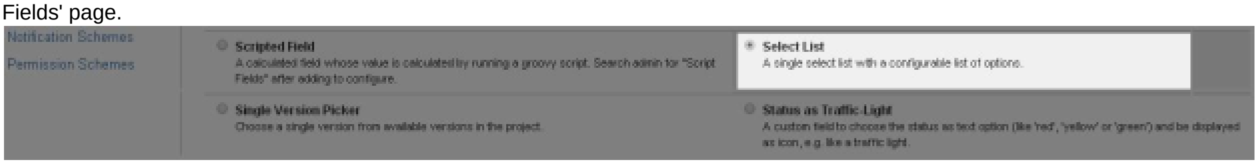
3. Click the **Next** button to open the **Create Custom Field - Details (Step 2 of 2)** page.

1. Complete the **Field Name** (custom field's title) and **Field Description**.
2. Select one or any number of '**Issue Types**' to which this custom field will be available. Alternatively, select '**Any issue type**' to make the custom field available to all Issue Types.
3. Select the applicable context, that is, the **'Project(s)'** to which the custom field will be available. Alternatively, select **'Global context**' to make the custom field available to all projects.
4. 

5. Click the '**Finish**' button. This will bring you to the screen association page:

1. Select a screen, or screen tab, on which to display your newly created custom field. You must associate a field with a screen before it will be displayed. New fields will be added to the end of a tab.
2. Click the '**Update**' button. You will return you to the View Custom Fields page, which displays a summary of all custom fields in JIRA system.
3. You can **edit**, **delete** or **configure** custom fields here. This page is also directly accessible from the menu bar to the left of all Administration pages.

Creation of **Select List** Custom Field

1. Log in as a user with the **JIRA Administrator.**
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Fields > Custom Fields** to open the 'Custom Fields' page.
3. 

4. Click the **Add Custom Field** button on to open the **Create Custom Field: Choose the field type (Step 1 of 2)** page.

1. Select the **Select List** type of field for new custom field.
2. 

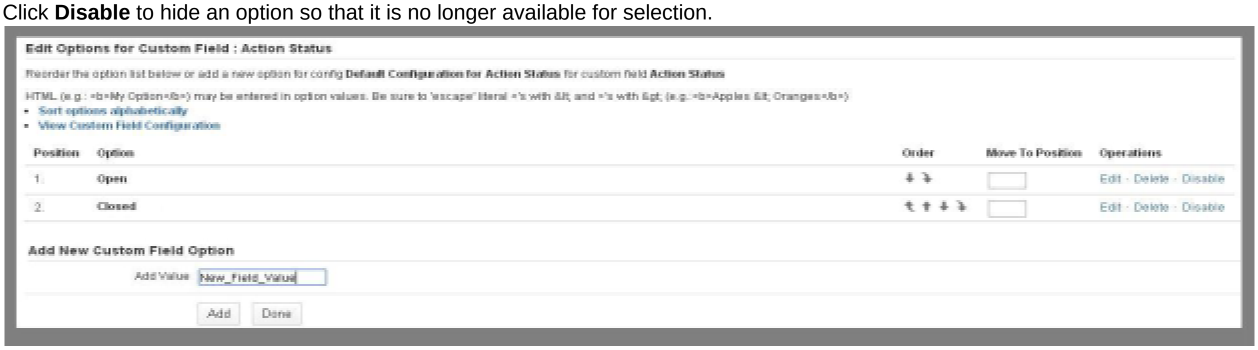
3. Click the **Next** button to open the **Create Custom Field - Details (Step 2 of 2)** page.

1. Complete the **Field Name** (custom field's title) and **Field Description**.
2. Select one or any number of '**Issue Types**' to which this custom field will be available. Alternatively, select '**Any issue type**' to make the custom field available to all Issue Types.
3. Select the applicable context, that is, the **'Project(s)'** to which the custom field will be available. Alternatively, select '**Global context**' to make the custom field available to all projects.

4. 

5. Click the '**Finish**' button. This will bring you to the screen association page:

1. Select a screen, or screen tab, on which to display your newly created custom field. You must associate a field with a screen before it will be displayed. New fields will be added to the end of a tab.
2. Click the '**Update**' button. You will return you to the View Custom Fields page, which displays a summary of all custom fields in JIRA system.
3. For **Select List** custom field, various field values needed to be specified, to specify these field values locate the relevant custom field and choose **cog icon > Configure**.
4. Locate the relevant context (there will usually only is one, named 'Default Configuration Scheme for ...') and click the **Edit Options** link.
5. The 'Edit Custom Field Options' page will display:

- Click **Sort alphabetically** to automatically re-order the options alphabetically.
- Click the arrows in the **Order** column, or specify a number and click the **Move** button, to re-order the options manually.
- Click **Edit** to change the text of an option.
- Click **Disable** to hide an option so that it is no longer available for selection.
- 

- Click **Delete** to remove an option.

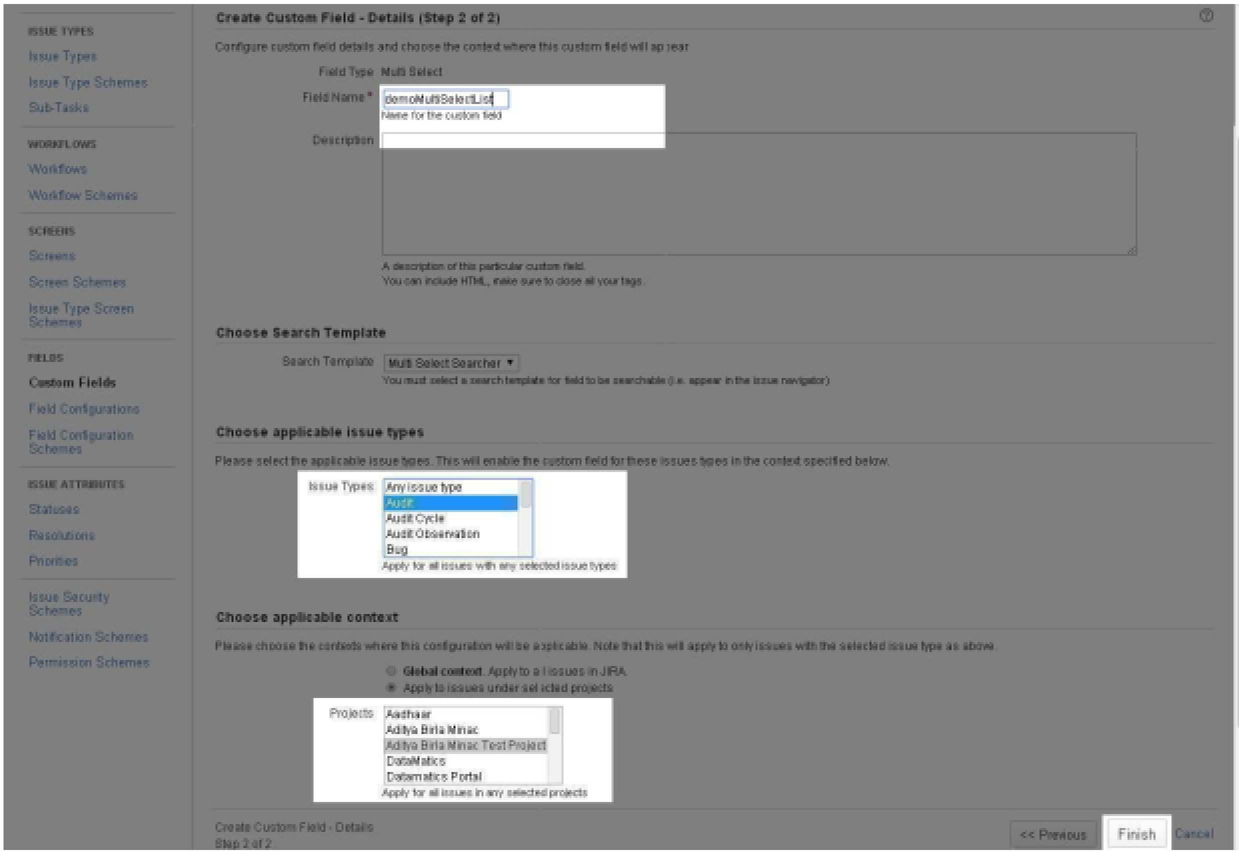
1. To add new field value, enter new field value in **add value** text box located under **add new custom field option** section, after adding field value, click on '**Add'**, and then Click on '**Done'** after adding desired number of field values.

Creation of **Multi Select List** Custom Field

1. Log in as a user with the **JIRA Administrator.**
2. Choose the **cog icon**  at top right of the screen, and then choose **Issues**. Select **Fields > Custom Fields** to open the 'Custom Fields' page.
3. 

4. Click the **Add Custom Field** button on to open the **Create Custom Field: Choose the field type (Step 1 of 2)** page.

1. Select the **Multi Select List** type of field for new custom field.

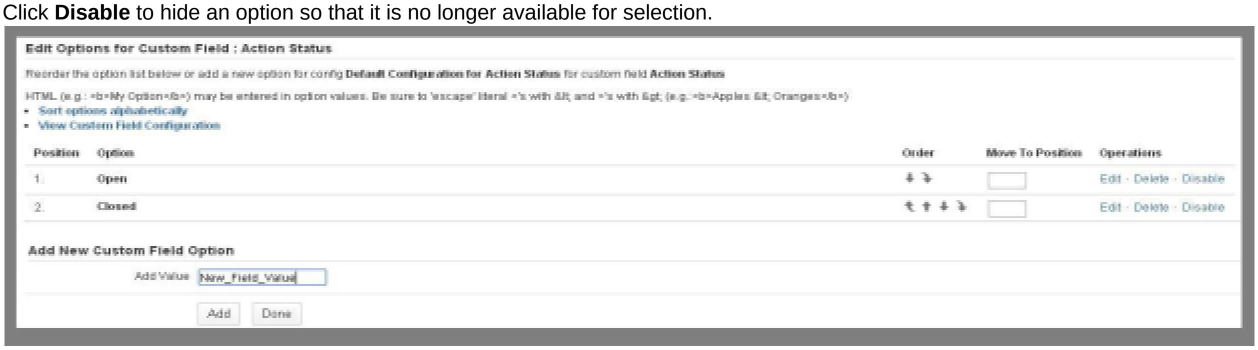
2. 

3. Click the **Next** button to open the **Create Custom Field - Details (Step 2 of 2)** page.

1. Complete the **Field Name** (custom field's title) and **Field Description**.
2. Select one or any number of '**Issue Types**' to which this custom field will be available. Alternatively, select '**Any issue type**' to make the custom field available to all Issue Types.
3. Select the applicable context, that is, the **'Project(s)'** to which the custom field will be available. Alternatively, select **'Global context**' to make the custom field available to all projects.
4. 

5. Click the '**Finish**' button. This will bring you to the screen association page:

1. Select a screen, or screen tab, on which to display your newly created custom field. You must associate a field with a screen before it will be displayed. New fields will be added to the end of a tab.
2. Click the '**Update**' button. You will return you to the View Custom Fields page, which displays a summary of all custom fields in JIRA system.
3. For **Multi Select List** custom field, various field values needed to be specified, to specify these field values locate the relevant custom field and choose **cog icon > Configure**.
4. Locate the relevant context (there will usually only is one, named 'Default Configuration Scheme for ...') and click the **Edit Options** link.
5. The 'Edit Custom Field Options' page will display:

- Click **Sort alphabetically** to automatically re-order the options alphabetically.
- Click arrows in **Order** column, or specify a number and click **Move** button, to re-order options manually.
- Click **Edit** to change the text of an option.
- Click **Disable** to hide an option so that it is no longer available for selection.
- 

- Click **Delete** to remove an option.

1. To add new field value, enter new field value in **add value** text box located under **add new custom field option** section, after adding field value, click on '**Add'**, and then Click on '**Done'** after adding desired number of field values.

NOTE:

- In present scenario all the custom fields have limited scope i.e. they are visible to only selected Issue type Vs. Projects.
- If user tries to add custom field from other issue type to new issue type, it would not be available because of its limited scope. User first needs to change the custom field scope i.e. change / add "**Issue Type**" and / or "**Context for Project**" as shown above.

SCREENS

Screens group all available fields (or a subset of all available fields) defined in JIRA and organize them for presentation to a user. Through screens, you can control what fields are displayed to the user during issue operations (e.g. **Create Issue** and **Edit Issue** dialog boxes) or workflow transitions (e.g. **Resolve Issue** dialog box), as well as define the order in which these fields are shown to them. A screen also allows you to split subsets of fields across multiple tabs.
Any newly created screen in JIRA is not usable by a JIRA project until it has been associated with either:

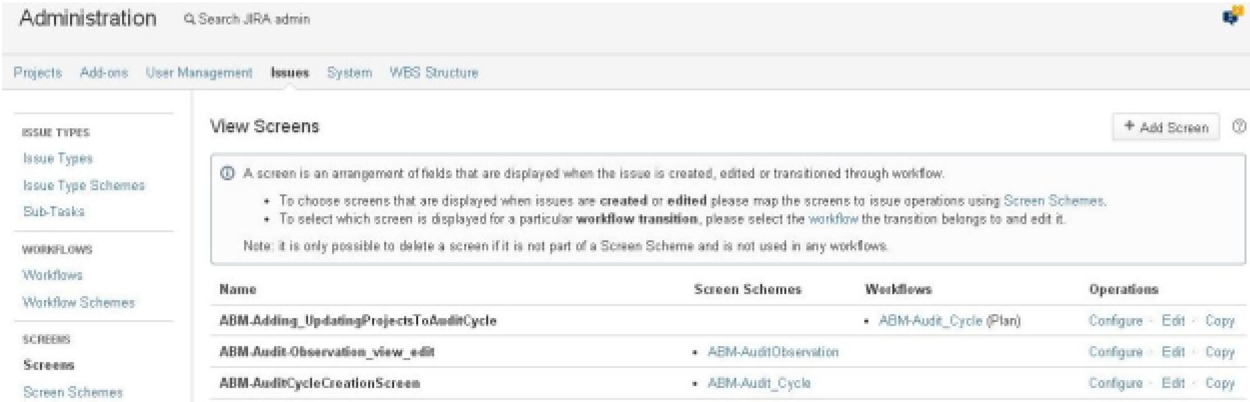
- An issue operation and issue type (via a screen scheme and then issue type screen scheme) *OR*
- A workflow transition.

JIRA ships with the **Default Screen**, **Resolve Issue Screen** and **Workflow Screen**, which are used as described below:

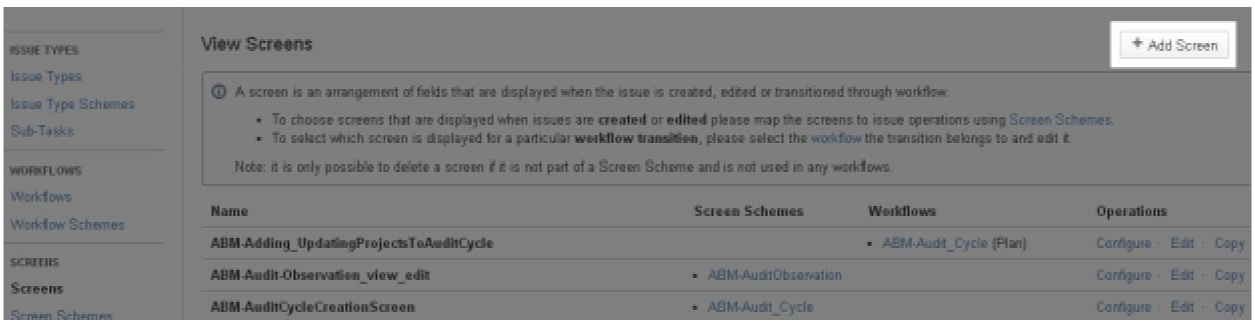
- **Default Screen** - used for the default issue operations for creating, editing or viewing an issue.
- **Resolve Issue Screen**- used for the transition view for the default **Close Issue** and **Resolve Issue** transitions, originating from the **Open** , **In Progress** and **Reopened** steps in JIRA's default workflow.
- **Workflow Screen** - used for the transition view for the default **Reopen Issue** transitions, originating from the **Resolved** & **Closed** steps and **Close Issue** transition, originating from the **Resolved** step in JIRA's default workflow.

How to add a new screen:

1. Log in as a user with the **JIRA Administrator**.



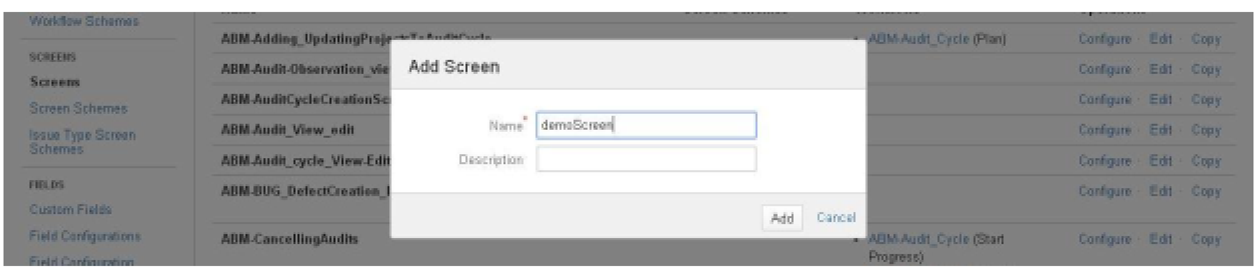
2.
3. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Screens** to open the 'View Screens' page, which lists all screens that have been defined in JIRA.



1.
2. Click the **Add New Screen** button to open the **Add New Screen** dialog box.

1. 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.



1. Click the **Add** button to add your new screen to JIRA.

How to edit screen:

1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then 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.
5. You will now be directed to the **Edit Screen** page where you can edit the name and/or description of the Screen.

1. After Editing screen name and/or description click on **Update** to save the changes.

How to copy screen:

1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then 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 appropriate screen.
4. 

5. You will now be directed to the **Copy Screen** page where you can edit the name and/or description of the Screen.

1. After defining screen name and/or description click on **Copy** to save the changes.

How to configure a screen's tabs and fields:

1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Screens** to open the 'View Screens' page, which lists all screens that have been defined in JIRA.
3. 

4. Click the **Configure** link to open the **Configure Screen** page for that screen.

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

Activating a screen

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

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

Following **Screens** have been created for **ABM JIRA** configuration,

Name	Screen Schemes	Workflows
ABM-Adding_UpdatingProjectsToAuditCycle		ABM-Audit_Cycle (Plan)
ABM-Audit-Observation_view_edit	ABM-AuditObservation	
ABM-AuditCycleCreationScreen	ABM-Audit_Cycle	
ABM-Audit_View_edit	ABM-Audit-Only	
ABM-Audit_cycle_View-Edit	ABM-Audit_Cycle	
ABM-BUG_DefectCreation_InProgress _Fixed_Closed	ABM-Defect_management	
ABM-CancellingAudits		ABM-Audit_Cycle (Cancel) ABM-Audit_Cycle (Close) ABM-Audit_Cycle (Start Progress) ABM-Audit_Cycle (Cancel) ABM-Audit_Observation (Reject) ABM-Audit_Observation (Close) ABM-Audit_workflow (Cancel) ABM-Audit_workflow (Close)
ABM-Close_CancelAuditCycle		
ABM-ClosingAuditFindings		
ABM-DefectManagement	ABM-Defect_management	
ABM-DefectStartProgress		ABM-DefectManagement (Start Progress) ABM-DefectManagement (Start Progress)
ABM-Defect_InProg_ToFix		ABM-DefectManagement (Fix)
ABM-Defect_Open_fixed		ABM-DefectManagement (Fix)
ABM-Enhancement_Create_InProgress_ OnHold_Closed_Abaonded	ABM-Enhancement	
ABM-Enhancement_SubTask_Create_ InProgress_OnHold_Closed_Abandoned	ABM_ENH_SUB	
ABM-IssueLoggingSheet	ABM-IssueManagement	ABM-Issue_Management (Start Progress) ABM-Issue_Management(Close)
ABM-IssueMgmt_IssueLogging		
ABM-PIAcceptedAndInProgress		ABM-PIFlow (Start Progress)
ABM-PIFlow_PI_Identify_InProcess_ Closed_Reject	ABM-PI_Screen scheme	
ABM-PIIdentification	ABM-PI_Screen scheme	
ABM-RejectingAuditFindings		
ABM-Risk-Identification	ABM-RiskMgmt	
ABM-RiskMgmt_OverallRisk_Update		
ABM-RiskMgmt_Risk_Identify_Update	ABM-RiskMgmt	
ABM-RiskMgmt_SQARisks_Identify_Update	ABM-SQA-Rsk	
ABM-Risk_update		ABM-RIsk_Management (Re-Open) ABM-RIsk_Management(Update) ABM-RIsk_Management (Close)

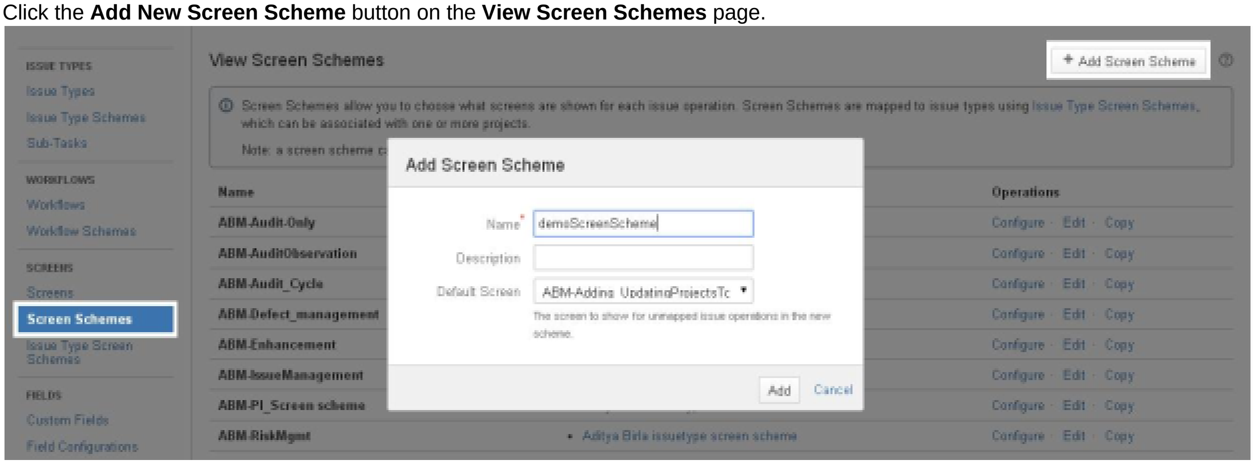
		ABM-RIsk_Management (Close) ABM-RIsk_Management (Close) ABM-SQARisk (Close) ABM-SQARisk (Close) ABM-SQARisk (Re-Open)
ABM-Risk_update_Over all		ABM-SQARisk (Update)
ABM-SQAIdentification	ABM-SQA-Rsk	
ABM-SQK_riskUpdate		ABM-SQARisk (Close)
ABM-ScreenWhenPIClosed		ABM-PIFlow (Close)
ABM-ScreenWhenPIRejected		ABM-PIFlow (Reject)
ABM-ServiceMgmt_Create_InProgress_Fix_Reject	ABM_Sevice_mg	
ABM-UpdatingAuditFindings	ABM-AuditObservation ABM-Audit-Only	ABM-Audit_workflow (Conduct)
ABM-UpdatingAuditFindingsForAuditObservations		ABM-Audit_Observation (Start Progress)
ABM_Defect_Fixed_toClosed		ABM-DefectManagement (Close) ABM-DefectManagement(Closure Verification)
ABM_ENH_CLOSE		ABM- Enhancement (Close)
ABM_ENH_HOLD_ABANDON		ABM- Enhancement (Abandon) ABM- Enhancement (Hold) ABM- Enhancement (Abandon) ABM- Enhancement (Hold) ABM- Enhancement (Abandon) ABM- Enhancement-SubTask(Abandon) ABM- Enhancement-SubTask(Hold) ABM- Enhancement-SubTask(Hold) ABM- Enhancement-SubTask(Abandon) ABM- Enhancement-SubTask(Abandon)
ABM_ENH_SUB_TASK	ABM_ENH_SUB	
ABM_ENH_StartProgress		ABM- Enhancement (Start Progress) ABM- Enhancement (Start Progress) ABM- Enhancement-SubTask(Start Progress) ABM- Enhancement-SubTask(Start Progress)
ABM_EnhancementCreateScreen	ABM-Enhancement	
ABM_Only_remark		ABM-DefectManagement (Not a Defect) ABM-DefectManagement (Close) ABM-Service Management(Close)
ABM_SER_strt_progress		ABM-Service Management (Start Progress)
ABM_SUB_Close		ABM- Enhancement-SubTask(Close)
ABM_Ser_CLOSE_OPEN		ABM-DefectManagement (Re-Open) ABM-DefectManagement (Re-Open) ABM-DefectManagement (Re-Open) ABM-Service Management (Not in Scope) ABM-Service Management (Not in Scope) ABM-Service Management(Close and Verify) ABM-Service Management(Re-Open) ABM-Service Management(Re-Open)
ABM_Ser_INprog_fix		ABM-Service Management (Fix)
ABM_Service_MGMT	ABM_Sevice_mg	
	ABM_ENH_SUB	

Copy of ABM-Enhancement_SubTask_View_InProgress_OnHold_Closed_Abandoned		
Copy of ABM-Enhancement_View_InProgress_OnHold_Closed_Abaonded	ABM-Enhancement	

Screen Scheme
A 'screen scheme' allow you to choose which screen will be shown to a JIRA user when they perform a particular *issue operation.* There are three issue operations for which you can choose a screen:

- **Create Issue** — the screen that is shown when an issue is being created.
- **Edit Issue** — the screen that is shown when an issue is edited.
- **View Issue** — the screen that is shown when a user views an issue.

In a screen scheme, you can specify the same screen (or choose different screens) for these issue operations. Once you have created your screen scheme, you will need to activate it by associating the screen scheme with issue types via an 'issue type screen scheme'. (In turn, issue type screen schemes are associated with JIRA projects.)
Please be aware that although it is possible to associate any screen defined in your JIRA installation with either a screen scheme or a workflow transition view, screen schemes and workflow transition views are distinct and unrelated.
Adding a Screen Scheme

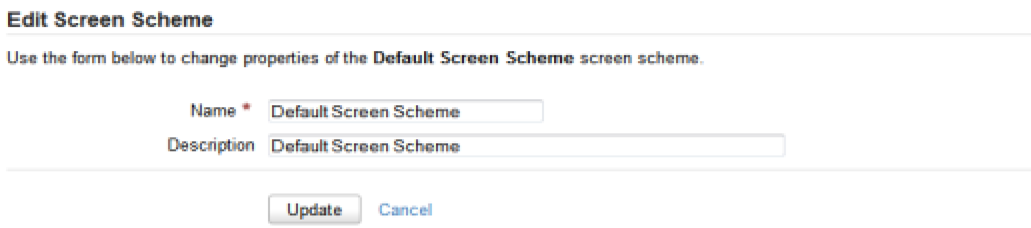
1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Screens > Screen Schemes** to open the 'View Screens Schemes' page.
3. Click the **Add New Screen Scheme** button on the **View Screen Schemes** page.
4. 

5. Fill out the details for the new screen scheme on the form that is displayed.

Note: default screen is used for issue operations that do not have screen associated with them.

Editing a Screen Scheme's details

1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Screens > Screen Schemes** to open the 'View Screens Schemes' page.
3. The **View Screen Schemes** page is displayed. Click **Edit** next to desired screen scheme.

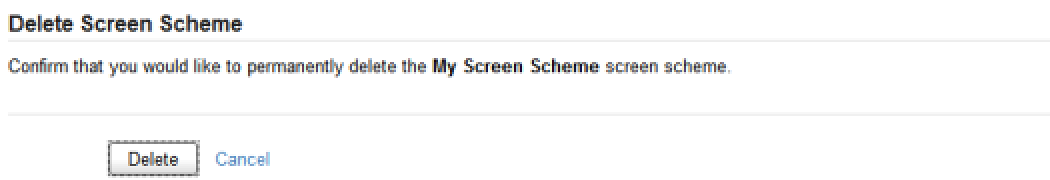


1. You will now be directed to the **Edit Screen Scheme** page where you can edit the Screen Scheme's name and description and the Screen that is associated with the *Default Entry* of the scheme.

Deleting a Screen Scheme

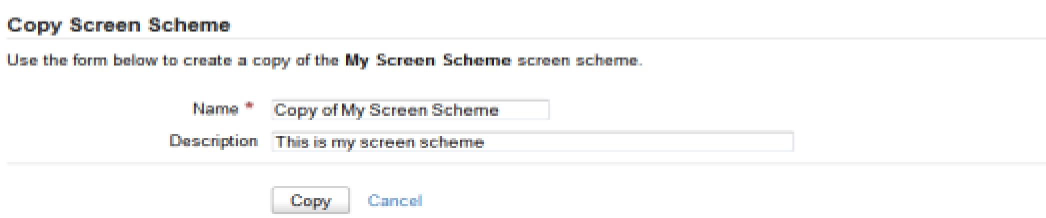
Note that screen schemes that are associated with an Issue Type Screen Scheme cannot be deleted. You will first need to edit the Issue Type Screen Scheme and remove the Screen Scheme.

1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Screens > Screen Schemes** to open the 'View Screens Schemes' page.
3. The **View Screen Schemes** page is displayed. Click the **Delete** link next to the desired Screen Scheme. You will be prompted to confirm your deletion.



Copying a Screen Scheme

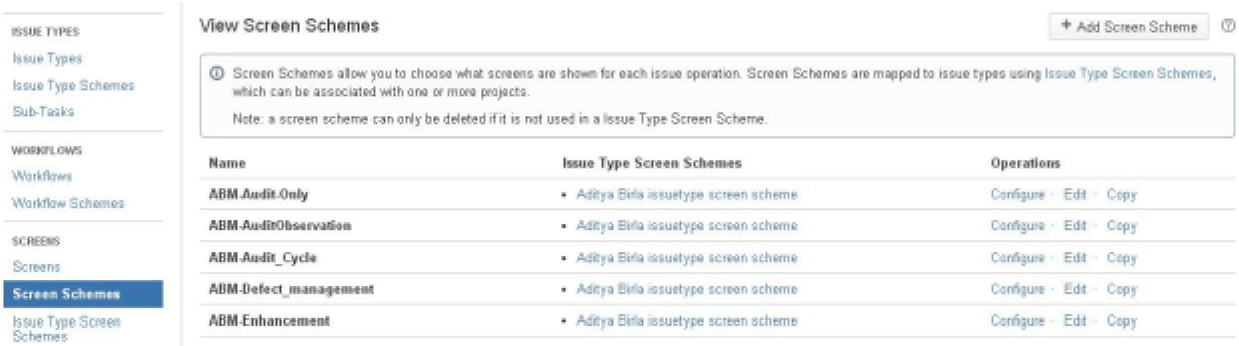
1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Screens > Screen Schemes** to open the 'View Screens Schemes' page.
3. The **View Screen Schemes** page is displayed. Click **Copy** next to the Screen Scheme you wish to copy.
4. You will now be directed to the **Copy Screen Scheme** page. Enter the name and description of the new Screen Scheme and click the **Co py** button.



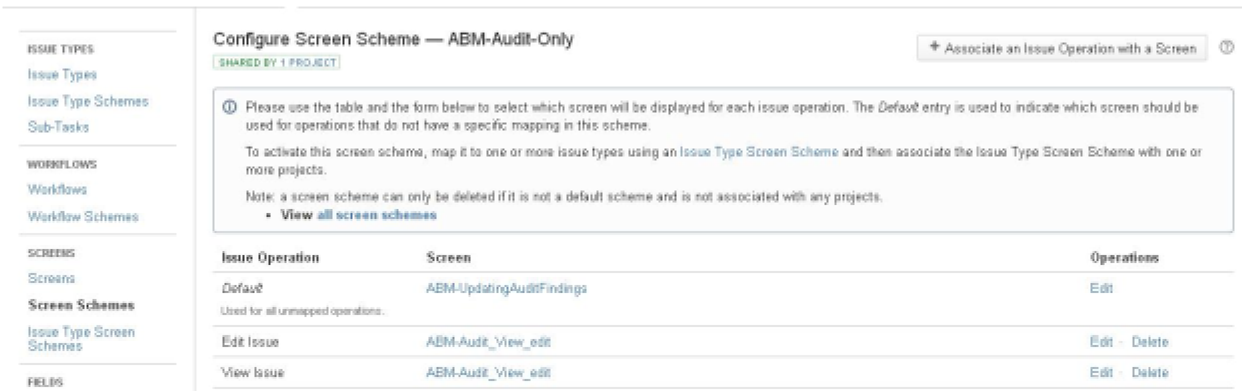
Configuring a Screen Scheme

Associating a screen with an issue operation

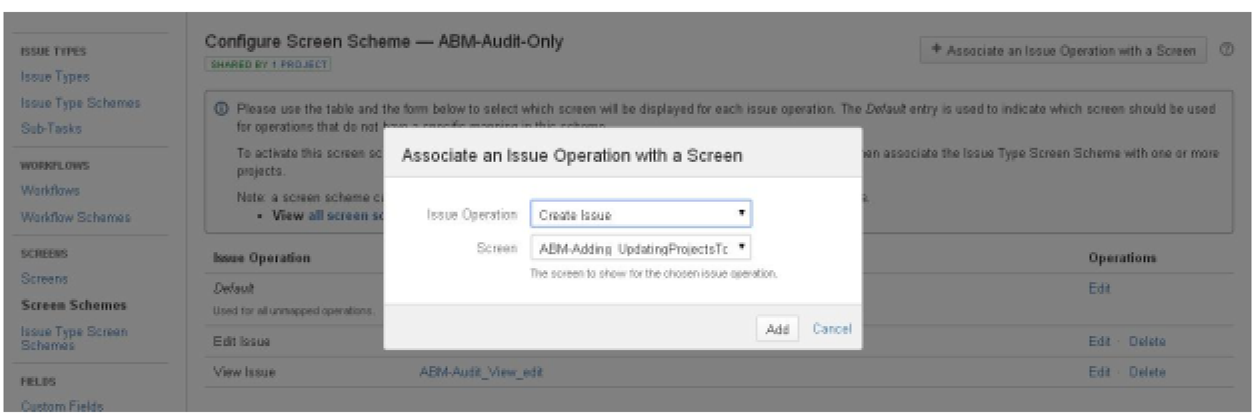
1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Screens > Screen Schemes** to open the 'View Screens Schemes' page.



1. Locate the screen scheme in which you are interested, and click the **Configure** link next to it. The **Configure Screen Scheme** page is displayed:



1. Click **Associate an Issue Operation with a Screen** to open this window:



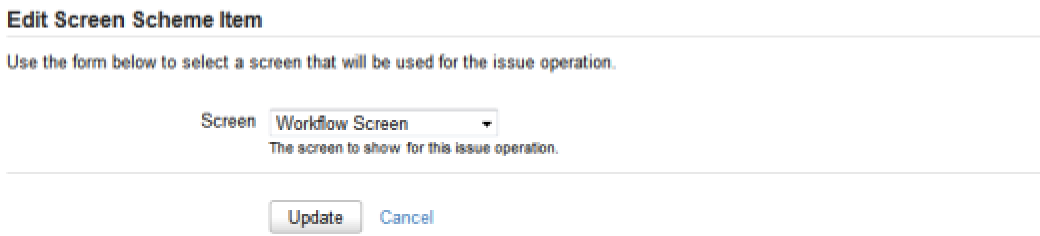
1. Do the following:
    1. Select the Issue Operation with which you wish to associate a Screen.
    2. Select the desired Screen.

Important Notes

- There can only be one association for an issue operation per Screen Scheme. If all operations have been associated with a Screen, use the **Edit** link next to each operation to change the Screen it is associated with.
- If an issue operation does not have a specific mapping to a Screen, the screen that is associated with the *Default* entry will be used for that operation. The *Default* entry cannot be deleted from a Screen Scheme. Click **Edit** next to the *Default* entry to change the Screen that is associated with it.
- The **View Issue** operation only allows you to control the layout of custom fields in the middle of the **View Issue** page. It ignores all the non-custom fields on the Screen.

Editing an association

1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Screens > Screen Schemes** to open the 'View Screens Schemes' page.
3. The **View Screen Schemes** page is displayed.
4. Locate the Screen Scheme in which you are interested, and click the **Configure** link next to it. The **Configure Screen Scheme** page is displayed.
5. On the **Configure Screen Scheme** page, click **Edit** next to the issue operation you wish to edit. The **Edit Screen Scheme Item** page is displayed:



1. Select the desired screen and click **Update**.

Deleting an association

1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Screens > Screen Schemes** to open the 'View Screens Schemes' page.
3. The **View Screen Schemes** page is displayed.
4. Locate the Screen Scheme in which you are interested, and click the **Configure** link next to it. The **Configure Screen Scheme** page is displayed.
5. On the **Configure Screen Scheme** page, click the **Delete** link next to the issue operation you wish to remove.

Activating a Screen Scheme

To activate a Screen Scheme, you need to associate it with one or more projects and issue types, using **Issue Type Screen Schemes**. To activate a Screen Scheme:

1. Configure an **Issue Type Screen Scheme** to use the Screen Scheme.
2. Associate the **Issue Type Screen Scheme** with a project.

Following **Screens Schemes** have been created for **ABM JIRA** configuration,

Name	Issue Type Screen Schemes
ABM-Audit-Only	Aditya Birla issuetype screen scheme
ABM-AuditObservation	Aditya Birla issuetype screen scheme
ABM-Audit_Cycle	Aditya Birla issuetype screen scheme
ABM-Defect_management	Aditya Birla issuetype screen scheme
ABM-Enhancement	Aditya Birla issuetype screen scheme
ABM-IssueManagement	Aditya Birla issuetype screen scheme
ABM-PI_Screen scheme	Aditya Birla issuetype screen scheme
ABM-RiskMgmt	Aditya Birla issuetype screen scheme

ABM-SQA-Rsk	Aditya Birla issuetype screen scheme
ABM_ENH_SUB	Aditya Birla issuetype screen scheme
ABM_Sevice_mg	Aditya Birla issuetype screen scheme
Aditya Birla Minac screen scheme	Aditya Birla issuetype screen scheme

Issue Type Screen Scheme
An 'issue type screen scheme' associates a 'screen scheme' (which defines mappings between screens and issue operations) with 'issue types'. Hence, an issue type screen scheme allows you to specify different 'screens' for different issues types when used *for the same* issue operation (e.g. 'Create Issue') in a given JIRA project.

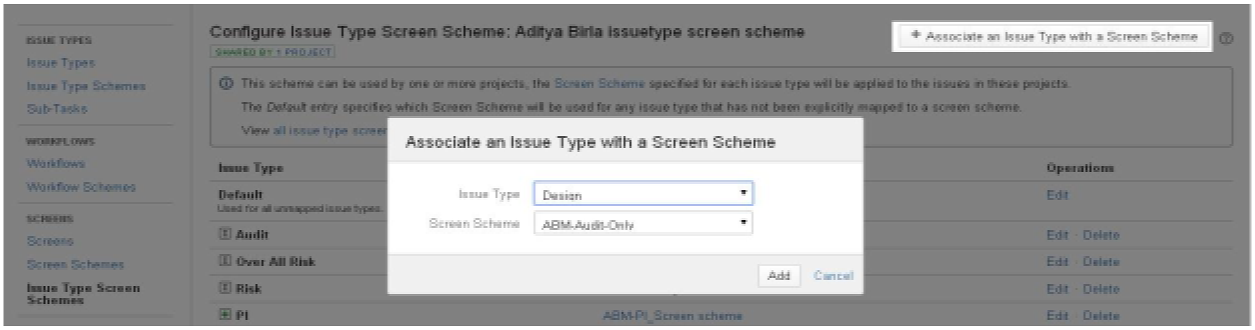
Configuring an Issue Type Screen Scheme
The configuration of an Issue Type Screen Scheme involves associating an issue type(s) with a particular Screen Scheme. For example, associating the 'Bug' issue type with the 'Default Screen Scheme' and then associating the 'Improvement' issue type with the 'Improvement Screen Scheme'.

Associating an Issue Type with a Screen Scheme

1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Screens > Issue Type Screen Schemes** to open the 'View Issue Type Screens Schemes' page.

1. Click the **Configure** link next to the desired Issue Type Screen Scheme, which opens the **Configure Issue Type Screen Scheme** page:

1. Click **Associate an issue Type with a Screen Scheme**, which displays this screen:



1. Select an Issue Type you wish to associate a Screen Scheme with.
2. Select the desired Screen Scheme.
3. Click the Add button and the new association will be added to the association list above.

Please Note

- There can only be one association for each issue type. If all issue types have been associated with a Screen Scheme you can use the **Ed it** link next to each entry to change the Screen Scheme that is associated with it.
- If there is no specific entry for an issue type, the Screen Scheme associated with the *Default* entry will be used.

Editing an Association

1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Screens > Issue Type Screen Schemes** to open the 'View Issue Type Screens Schemes' page.
3. Click the **Configure** link next to the desired Issue Type Screen Scheme, which opens the **Configure Issue Type Screen Scheme** page.
4. Click the **Edit** link next to the issue type you wish to edit, which displays the **Edit Issue Type Screen Scheme Entry** page.

1. Select the screen whose association you wish to change, and click the **Update** button.

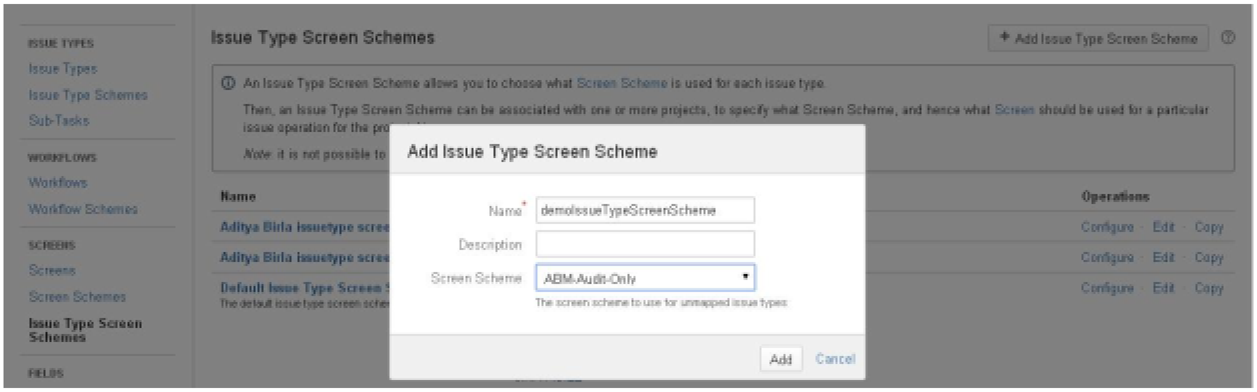
Deleting an Association

1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Screens > Issue Type Screen Schemes** to open the 'View Issue Type Screens Schemes' page.
3. Click the **Configure** link next to the desired Issue Type Screen Scheme, which opens the **Configure Issue Type Screen Scheme** page.
4. Click the **Delete** link next to the issue operation you wish to remove.

Note: The *Default* entry is used for all issue types that do not have a specific entry in the scheme. It cannot be deleted.

Adding an Issue Type Screen Scheme

1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Screens > Issue Type Screen Schemes** to open the 'View Issue Type Screens Schemes' page.
3. Click the Add Issue Type Screen Scheme button to open this page:



1. Enter the name for the new scheme. You can optionally add a description.
2. Select a Screen Scheme for the *Default* entry in the new scheme. The *Default* entry will be used for issue types that do not have a specific mapping in the scheme.
3. Click the **Add** button. The screen will automatically update the Issue Type Screen Schemes list with the new Issue Type Screen Scheme.

Editing an Issue Type Screen Scheme

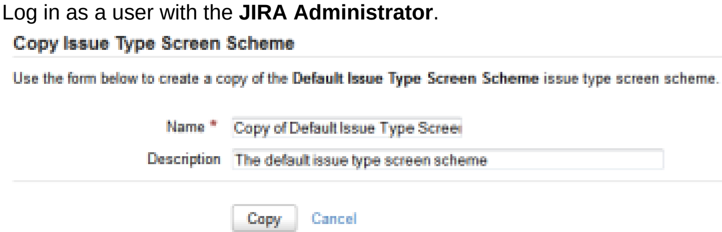
1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Screens > Issue Type Screen Schemes** to open the 'View Issue Type Screens Schemes' page.
3. Click the **Edit** link next to the desired Issue Type Screen Scheme to open the **Edit Issue Type Screen Scheme** page, where you can edit the Issue Type Screen Scheme's name and description as well as the Screen Scheme of the *Default* entry.

1. Click the **Update** button, which returns you to **View Issue Type Screen Schemes** page, with your updates now applied to the Issue Type Screen Schemes list.

Deleting an issue type screen scheme

1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Screens > Issue Type Screen Schemes** to open the 'View Issue Type Screens Schemes' page.
3. Click the **Delete** link next to the Issue Type Screen Scheme you wish to delete.

Note: Issue Type Screen Schemes that are associated with a project cannot be deleted.
Copying an Issue Type Screen Scheme

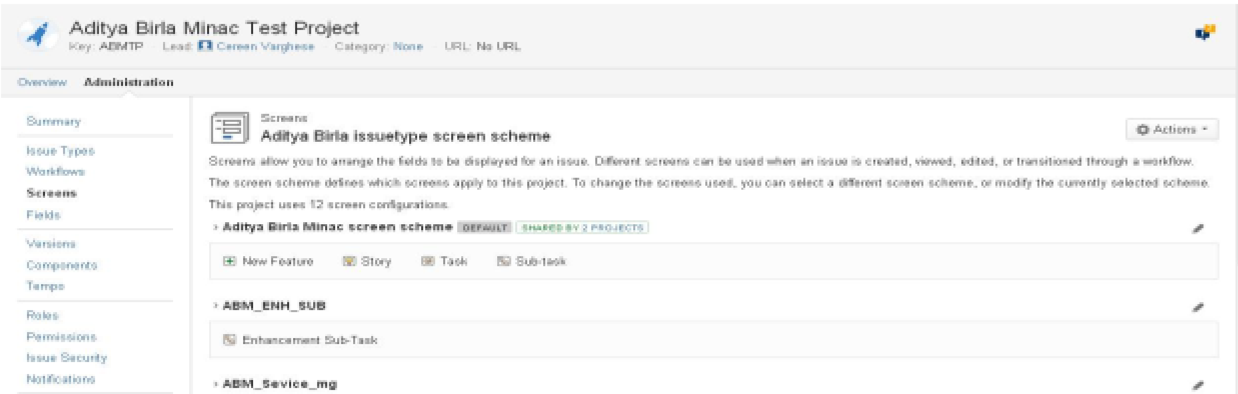
1. Log in as a user with the **JIRA Administrator**.


2. Choose the **cog icon** at top right of the screen, and then choose **Issues**. Select **Screens > Issue Type Screen Schemes** to open the 'View Issue Type Screens Schemes' page.
3. Click the **Copy** link next to the field screen you wish to copy, which opens the **Copy Issue Type Screen Scheme** page.

1. Enter name and description of new Issue Type Screen Scheme and click **Copy** button.

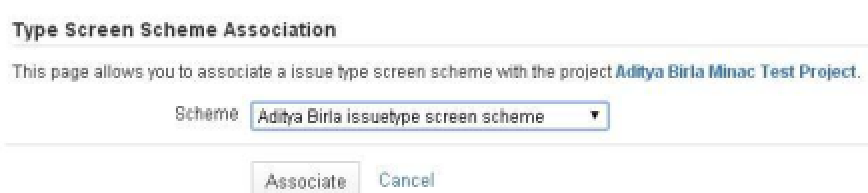
Associating an issue type screen scheme with a project
Once you have created and configured an Issue Type Screen Scheme to your desired settings, you can now associate the scheme with a Project. This will apply your chosen Screen Scheme to each issue type within the selected project.

1. Log in as a user with the **JIRA Administrator**.
2. Choose the **cog icon** at top right of the screen, and then choose **Projects**.
3. Select the project you wish to configure by clicking on its name.
4. Select Screens, you should see something like this:



1. Click the **Actions** dropdown menu and choose **Use a different scheme**.

1. Select the Screen Scheme you wish to associate with this project.



1. Click the **Associate** button.

Following **Issue Type Screen Schemes** have been created for **ABM JIRA** configuration,

Issue Type	**Screen Scheme**
Audit	ABM-Audit-Only
Audit Cycle	ABM-Audit_Cycle
Audit Observation	ABM-AuditObservation

Bug	ABM-Defect_management
Improvement	ABM-Enhancement
Enhancement Sub-Task	ABM_ENH_SUB
Issue Management	ABM-IssueManagement
Risk	ABM-RiskMgmt
Over All Risk	ABM-SQA-Rsk
PI	ABM-PI_Screen scheme
Service	ABM_Sevice_mg
Default	Aditya Birla Minac screen scheme