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# 7 Use Cases of Projectrak & Automation for Jira





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# Automate the creation of a task for the Jira Administrator when a project is ready to archive

## OBJECTIVE

Project archiving  
communication

## AUDIENCE

- Project Leads
- Jira Administrators

## FOCUS

Monitorization  
& Jira Governance

Available on the  
▲ **ATLASSIAN** Marketplace

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## DESCRIPTION

The communication between Project Leads and Jira Administrators it's usually nonexistent, and if it does exist, it happens through emails, chats, or any other notification tool, and sometimes this situation prevents both sides from getting the information they need.

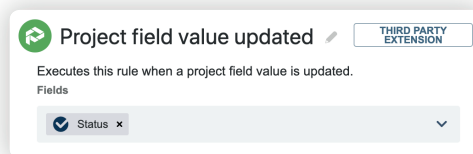
By implementing this automation is possible to set up automatic tasks creation to notify the Jira Administrator when a project is no longer in use, therefore available to archive.

## BEFORE SETTING UP, REMEMBER:

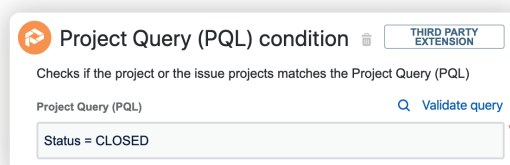
- ✓ In Projectrak, create a "Status" project field named "Status"
- ✓ Include the values: Ongoing, Paused, Closed

## CONFIGURATION

- 1 In Automation, setup the "Trigger":**  
"Project Field Value Updated" and add the project field previously created, named "Status"

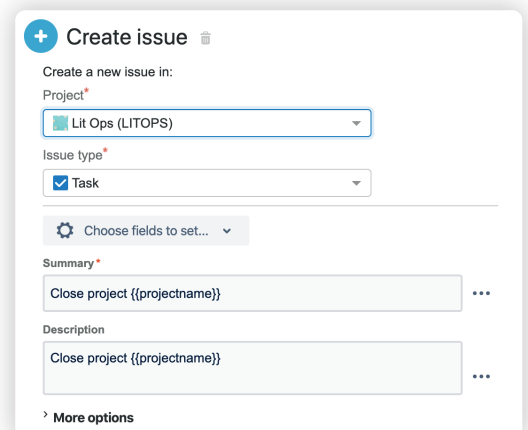


- 2 Configure a Projectrak "Condition" in Automation: Status=Closed**

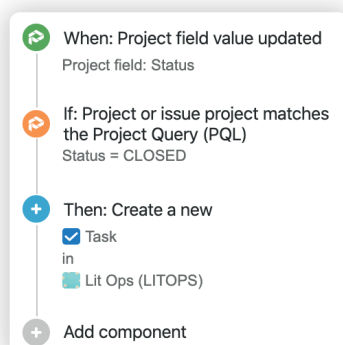


- 3 Setup the Automation "Action":**

By creating an issue ("Create Issue" -it comes by default-) in the project of the Jira Admin, notifying everytime a project X is ready to be archived



## AUTOMATION SUMMARY



## TEST

- ✓ Set the project status to "Closed"
- ✓ Check if in the Jira Admin project (e.g: Lit OPS) it has been created a petition with the project archiving task



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# Automate notifications for Jira Administrators when a project has been deleted

## OBJECTIVE

Tracking deleted projects

## AUDIENCE

· Jira Administrators

## FOCUS

Monitorization  
& Jira Administration

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## DESCRIPTION

To restore a Jira project previously deleted and finding a backup for that, it's usually a complicated and tedious task, specifically if it was done a long time ago.

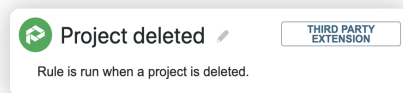
Here you'll learn how to automatically notify Jira Administrators every time a project has been deleted.

## BEFORE SETTING UP, REMEMBER:

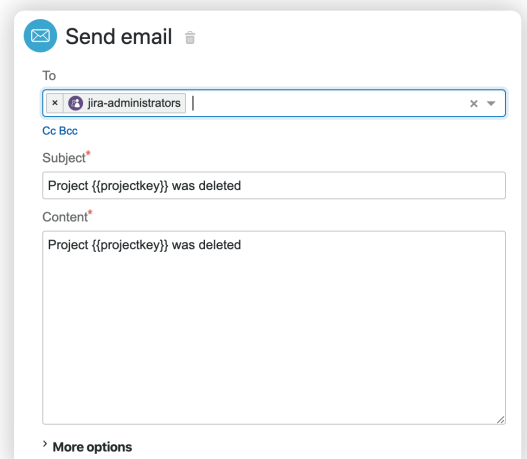
Be very careful! We strongly advise you to try this first in a testing environment, given this will actually delete your projects if you do it in a production environment.

## CONFIGURATION

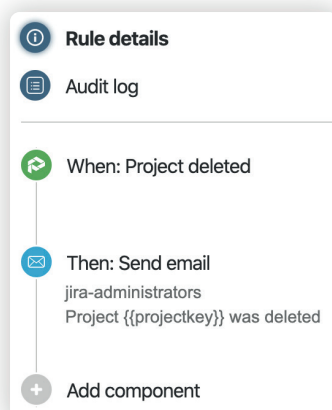
### 1 Configure the "Trigger": Set as Project Deleted



### 2 Setup the "Action": to "Send email" (with Profields is possible to include Smart Values such as {{projectkey}})



## AUTOMATION SUMMARY



## TEST

- ✓ Create a sample project
- ✓ Delete the sample project

**WARNING:** Please, keep in mind when testing in production environments: performing this action will delete your projects for good.

**Bonus Tip:** Do you need to remove the schemes associated with the projects as well? The Projectrak Bulk Operations feature, perform this action in a simple and massive way.



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# How to automatically update the budget status of a project?

## OBJECTIVE

Track the project budget

## AUDIENCE

- Project Managers
- Project Leads
- Finance roles

## FOCUS

Project tracking  
& Project reporting

Available on the  
▲ **ATLASSIAN** Marketplace

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## DESCRIPTION

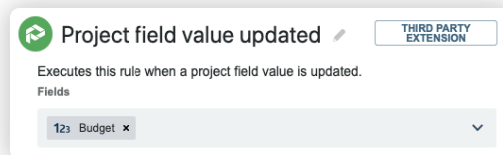
Automate the update of the budget status of a project when is more than 0, this way will be possible to obtain statistics about all budgeted projects.

## BEFORE SETTING UP, REMEMBER:

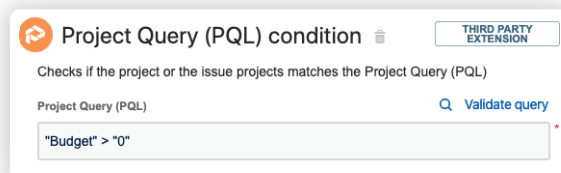
- ✓ Create a **status project field** called "Budgeted" with two values: "Yes" and "No"
- ✓ Create a **numeric project field** called "Budget"

## CONFIGURATION

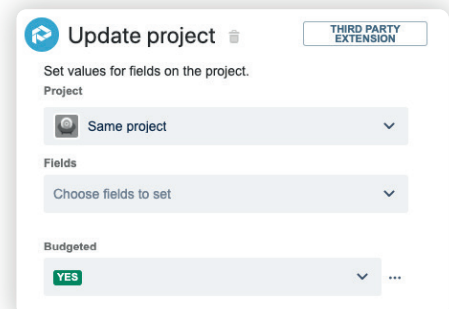
- 1 Configure the "Trigger":** in the "Project Field Value Updated" include the previously created field named "Budget"



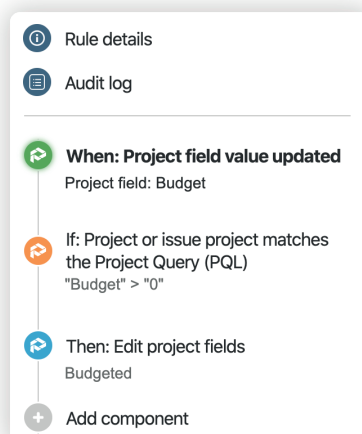
- 2 Include a Projectrak "Condition":** "Budget" > "0"



- 3 Setup the "Action":** update project  
→ Change the "Budgeted" to "Yes"



## AUTOMATION SUMMARY



## TEST

- ✓ Set the value of the "Budgeted" field to "No"
- ✓ Modify the value of the "Budget" field to 1000
- ✓ Check how the field "Budgeted" automatically changes to "Yes"



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# Automatically update the status value of a project to "Active" every time an issue within is updated

## OBJECTIVE

Tracking the activity status of projects

## AUDIENCE

- Project Managers
- Project Leads
- Jira Administrators

## FOCUS

Monitoring  
& Governance

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## DESCRIPTION

This automation will let you know which projects are active within your project portfolio by setting as inactive all of your projects, excepting the ones where an issue within have been recently updated (one day before)

## BEFORE SETTING UP, REMEMBER:

- ✓ Create a status project field named "Status"
- ✓ Include the values: Active, Inactive

## CONFIGURATION

### 1 Configure the "Trigger": "Scheduled"

**WARNING:** It's necessary to run a JQL to give context to Profields about the projects you will work the "Conditions" and "Actions"

**Scheduled**

Executes this rule on the provided schedule. You can choose if you'd like to perform actions on a set of issues gathered with a JQL search or simply execute the rule.

Schedule

☒ Fixed rate of every  Days

☐ Cron expression

5 minutes within the specified time. See the [CRON expressions documentation](#) for more help when adding schedules.

Cron expressions are scheduled in the default server time, currently: 20/01/20 10:16:47 pm

When rule executes...

☒ run a JQL search and pass results to subsequent conditions and actions

☐ simply run the conditions and actions without providing issues

JQL \*

[Validate query](#)

### 2 Setup the "Action": "Update Project"

→ Change status field to "Inactive"

**Update project**

Set values for fields on the project.

Project

Fields

Status

## AUTOMATION TEST

- ✓ Configure rule and immediately execute "Run"
- ✓ Validate the projects involved on the JQL results: are shown now as "Active" and "Inactive" respectively

### 3 Create the "JQL Condition": "updated >= -1d"

**JQL condition**

**Just doing a simple field check?**

Try using the issue condition instead - it does not require you to write any JQL and has better performance.

[Convert to Issue Condition](#) · [Dismiss](#)

Checks if issue matches JQL:

JQL \*

[Validate query](#)

### 4 Configure the "Action": "Update Project"

→ Change status field value to "Active"

**Update project**

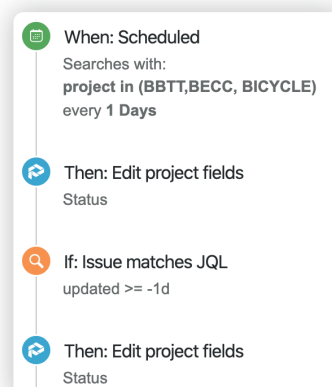
Set values for fields on the project.

Project

Fields

Status

## AUTOMATION SUMMARY





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# Automatically update the value of the project status to "Open," every time a new project is created

## OBJECTIVE

- Start new projects
- Configure values by default

## AUDIENCE

- Project Leads
- Jira Administrators

## FOCUS

Monitoring  
& Jira administration

Available on the  
▲ **ATLASSIAN** Marketplace

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## DESCRIPTION

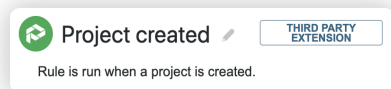
When a new project is created, is possible to every time, establish a default value for them. Here we will show how to automatically update them with the status value "Open."

## BEFORE SETTING UP, REMEMBER:

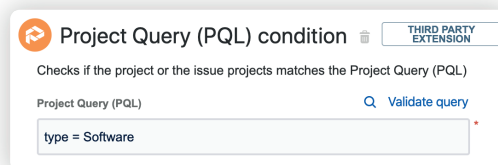
- ✓ Create a status project field type named "Status"
- ✓ Include the values: "Open", "In Progress", and "Done"
- ✓ Create a Layout and configure it as default for Jira software projects

## CONFIGURATION

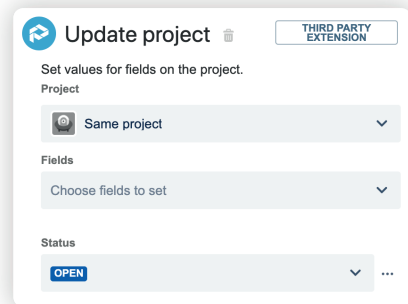
### 1 Configure the "Trigger": "Project created"



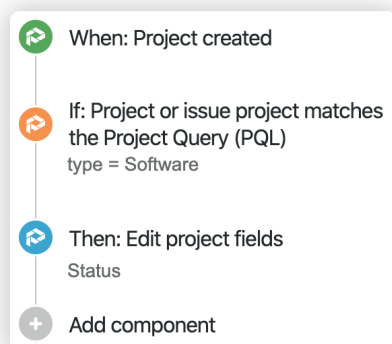
### 2 Create a Projectrak condition: "type = Software"



### 3 Create a Projectrak "Action": "Update Project" → change the status field to "Open"



## AUTOMATION SUMMARY



## AUTOMATION TEST

- ✓ Create a software project and verify if the status changes to "Open"





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# How to automate the update of the project field "Country" when a project is created, and the Project Lead is an specific user

## OBJECTIVE

Automatically configuring project fields depending on its Project Lead

## AUDIENCE

- Project Managers
- Project Leads
- Jira Administrators

## FOCUS

Jira Governance  
& Project Information

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## DESCRIPTION

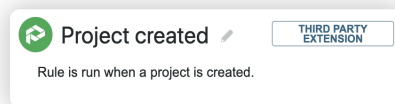
Updating project attributes depending on other roles is a common task. In this use case, we will show you how to automate the update of the project field "Country" every time a project is created, and the Project Lead is a specific user.

## BEFORE SETTING UP, REMEMBER:

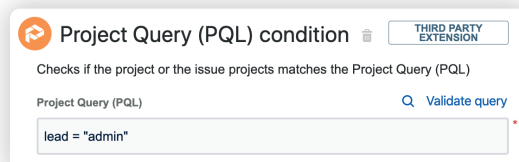
- ✓ Configure a "List" type project field of "Single Choice" named "Country"
- ✓ Include the corresponding values of the project field named "Country": "United States," "Germany," "France," "Netherlands," "Poland,"...
- ✓ Create a "Layout" and configure it as default for every Jira software projects

## CONFIGURATION

### 1 Configure the "Trigger": "Project created"

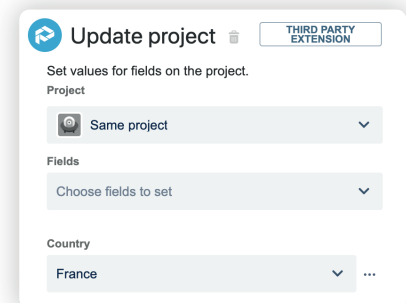


### 2 Create a Projectrak Condition: "lead = userX" (we are using admin in the example)

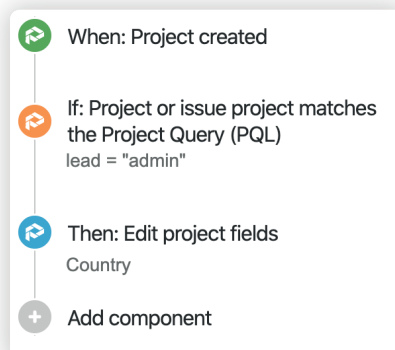


### 3 Create a Projectrak action:

"Update Project" → Change the project field "Country" to "France"



## AUTOMATION SUMMARY



## AUTOMATION TEST

- ✓ Create a Jira software project and choose the userX as Project Lead. Verify the value of the project field "Country" has changed to France, in this case.



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# Automate the update of the project status value when an issue is created

## OBJECTIVE

Tracking project status

## AUDIENCE

- Project Managers
- Project Leads
- Jira Administrators

## FOCUS

Monitoring  
& Reporting for projects

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## DESCRIPTION

This use case solves the situation when Jira Administrators create projects and they do not know when users start using them. It is also useful for Project Managers, when they need to track ongoing projects.

## BEFORE SETTING UP, REMEMBER:

- ✓ Create a Status project field named "Status"
- ✓ Include the values: "On Going", "Paused", "Closed"

## CONFIGURATION

### 1 Configure the "Issue Created" "Trigger"

**+ Issue created** ✎

Rule is run when an issue is created.

▼ **More options**

☐ Execute this rule immediately when the rule is triggered, instead of in the background

## AUTOMATION SUMMARY

**Rule details**

**Audit log**

---

**+ When: Issue created**  
Rule is run when an issue is created.

**Then: Edit project fields**  
Status

**+ Add component**

### 2 Create a Projectrak "Action": "Update Project" → change the value of the project field "Status", to "On Going"

**Update project** 🗑️ THIRD PARTY EXTENSION

Set values for fields on the project.

Project

Same project ▼

Fields

Choose fields to set ▼

Status

ONGOING ▼ ...

Cancel Save

## AUTOMATION TEST

- ✓ Create an issue and after a few seconds, verify the value of the project field "Status" has changed to "On Going"





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