Automation

Automation is a powerful feature that lets you create **dynamic structures**. Unlike a manually created structure, a dynamic structure can update itself when there are changes in JIRA. You can make parts of your manually created structure dynamic – for example, automatically place all issues that match a query under a manually added folder.

Automation works through **generators** – special rules which define, how the issues should be organised. Generators are added right inside the structure just like other items and their scope is defined by their position in the structure.

With generators you create a structure "skeleton" - the rules based on which your structure should be built, and only the skeleton is saved, not the issues. This means the structure is generated when you open the structure - hence the **Generators**.

Once you open some structure, the automation will start checking for relevant changes in your JIRA and update your structure as necessary, ensuring that the structure you are seeing is up-to-date. So there is no need to reload the page to see the latest updates.

Types of Generators

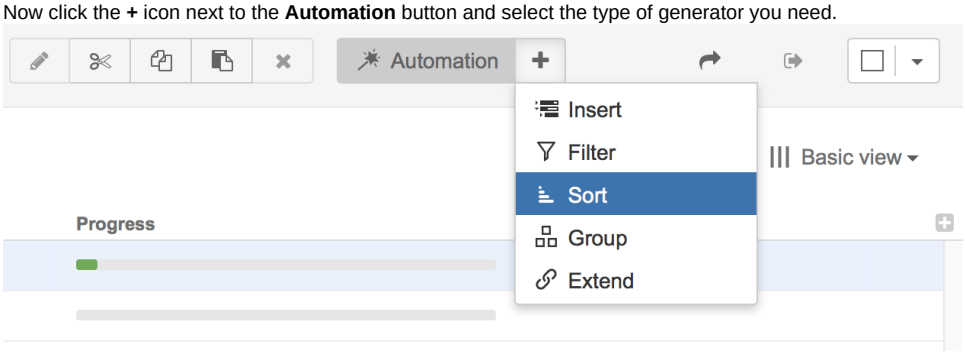
- **Insert.** Insert generators allow you to automatically add issues to the structure. It can be the results of a JQL or text query, Epics or Stories from an Agile board, or an entire structure. If some issue is updated and no longer satisfies the query, it's not shown anymore.
- **Filter.** If you want to remove some of the issues after you've built the structure (for example, remove all closed issues), you can use the **Filter Generator** and specify the query that describes the issues that you want to keep - the rest will be removed from the strucutre.
- **Sort.** To arrange your issues in a certain order you can use the Sort generator.
- **Group.** With this function you can break a list of issues into groups based on your JIRA fields.
- **Extend.** Using the extend functions you can pull in issues related to those that are already in the structure. You can extend with sub-issues, JIRA links and Epic links (if you are using JIRA Agile).

How to Add a Generator

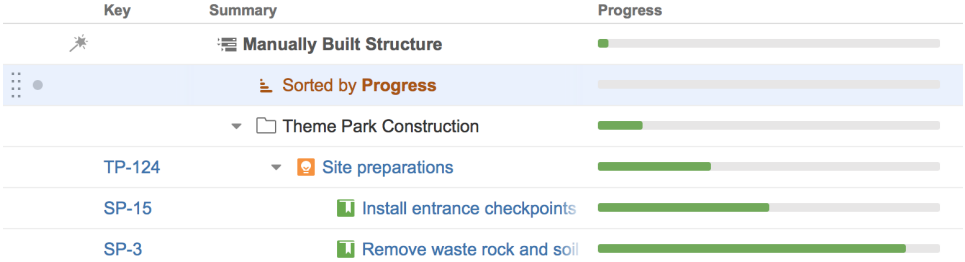
1. Normally, generators are not shown – you need to switch on the **Automation** button to be able to see and configure generators.
2. As you click the button, you will see the top level item with the structure name appear at the **Root** of the structure - this item works a parent for the whole structure.
3. Select where you want to add your generator - you can select the **Root** item if you want the generator to be applied to the whole structure, or select some static item if you want the generator to work under this item only.

   > You can only add generators under static parts of the the structure. You can not add them under items, which are added by other generators.

4. Now click the **+** icon next to the **Automation** button and select the type of generator you need.



5. For some generators you will need to select some options. Once you did that, click **Apply**. You will see the generator added to the structure.



6. Click the **Automation** button to hide the generators from the structure.

How to Edit a Generator

1. If you want to edit some existing generator, first switch on the Automation Editing mode by pressing the Automation button.
2. Find the generator you want to edit.

3. To change the scope of the generator, simply move it to the new place in the structure, just as you would move any other item. You can use drag-and-drop, or copy/paste.

   > You can not move the generator under an item, that was added by a generator. Only the static items added manually.

4. To change the generator settings, double-click the generator or use the **Edit** button in the structure toolbar.
5. Make the required changes and click **Apply** to save to them.
6. Click the **Automation** button to hide the generators.

How to Remove a Generator

1. If you want to remove some existing generator, first switch on the Automation Editing mode by pressing the Automation button.
2. Select the generator you want to delete and press **Delete** or use **Delete** button in the toolbar.
3. Click the **Automation** button to hide the generators.