The Connector

Version 1.2

Microsoft Project to Atlassian JIRA Connectivity

User Manual

Ecliptic Technologies, Inc. Copyright 2008

www.the-connector.com

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Introduction

The Connector is a Microsoft Project extension plug-in that allows users of Microsoft Project to connect and exchange data with Atlassian's issue management system, JIRA. The product creates a custom toolbar in Microsoft Project from which access to the functionality of the connector can be accessed.

System Requirements

The Connector requires:

- Microsoft Project 2003 or Microsoft Project 2007.
- Atlassian JIRA 3.6 or greater
- Microsoft .NET 3.0 or greater

Optional requirements for the extended functionality:

• The Connector extended web services *available for download from the* <u>www.the-connector.com</u> website.

Installation

Plug-in Installation

To install the plug-in, run the Trial Version installer available on the <u>www.the-</u> <u>connector.com</u> website. Once the plug-in is installed, you will get a registration key dialog when you run Microsoft Project. Enter your product key that was emailed to your when you purchased the product and the plug-in will be unlocked to full functionality.

The Connector Extended Web Service Installation

The extensions to the JIRA web services will provide the connector with some enhanced functionality. Follow the instructions below to install the extensions.

NOTE: You must have Atlassian JIRA 3.6 or greater

1) Download the JIRA Services for The Connector 1.2 from the website.

2) Unzip the file com.ecliptictech.connector.jar and copy it to the WEB-INF/lib directory located under your JIRA installation root directory. This may vary from version to version on installation process.

NOTE: These services replace the services that were used by version 1.0. Version 1.1 of The Connector will not recognize or need the services from the prior version.

3) Enable the RPC extensions in JIRA

4) Restart JIRA

Enabling JIRA Web Services

For the plug-in to work, the built in JIRA web services must be enabled. This is enabled under the Administration section of JIRA in the General Configuration area. Make sure the "Accept Remove API calls" option is turned on.

Logout commutation	novoi
Use gzip compression	OFF
Accept remote API calls	ON
User email visibility	Public
Commont visibility	Project Roles only

If the services are correctly installed, you should see and entry in the "Plugins" section of the JIRA administration.

Installed Plugins	The Connector for Microsoft Project	
Admin Menu Sections 66 modules.	Description: Microsoft Project to JIRA Integration Vendor: Ecliptic Technologies, Inc.	
Custom Field Types & Searchers 36 modules.	Plugin Version: 1.2 JIRA Versions: 3.6 - 3.12	
RPC JIRA Plugin	Disable plugin	
14 modules.	SOAP Services for The Connector (theconnector) SOAP Web Services for The Connector	Disable module
47 modules. <u>Issue Operations Plugin</u> 18 modules.	The Connector for Microsoft Project (rpc-theconnector) RPC - Extended web services for enhanced functionality with The Connector for Microsoft Project.	Disable module
The Connector for Microsoft Project 2 modules.		
Workflow Plugin 20 modules.		

Registration

When the trial version is installed, you will get a registration screen before any Connector function. To remove this screen, you need to purchase a copy of the plugin and enter in the registration key that will be provided after the purchase. Once the registration key has been entered, the trial version screen will disappear.

The trial version of The Connector provides a fully functional 30 day evaluation of the product.

Overview

The JIRA Connector Toolbar

The JIRA toolbar is the central management point for The Connector. The toolbar is fully dockable, so feel free to move the toolbar where it works best for you.

Micros	oft Proje	ct - Project1		-			-		_					0 x
		View Insert	Format	Tools	Project	Papart	Collaborate	Window	JIRA	Help	Type a que	stion for h	eln	- 8
a second second						- Storeson	19-19 March 19 Constant	and the second second	217-202 C	rial				No per o
			11 11 11 11 11 11 11 11 11 11 11 11 11				NAME OF A DESCRIPTION OF			la		- 8 -	D	<u>u</u>
Send To	JIRA Up	date From JIRA	Sync All	Tools •	Project In	fo Impo	ort Configure	 JIRA Logo 	ut 🗧					

The toolbar contains access to all the functions of The Connector. The options are summarized below.

Send to JIRA - Push task information to JIRA issues

Update from JIRA - Pull issue, status, and worklog information into Microsoft Project

Sync All - Bi-directionally exchange data between Microsoft Project and JIRA

Tools / Link Issue - Link a Microsoft Project task with an existing JIRA issue

Tools / Issue Editor – The issue editor allows for quick and easy access to all of the JIRA specific values related to a task.

Tools / Task Browser – The task browser allows for a quick summary of all the tasks and their related issues in a project plan.

Tools / Mark as JIRA Ignored – This function allows you to select multiple tasks and mark them all as JIRA Ignored.

Tools / Remove Selected From JIRA– This function will remove all of the selected tasks from JIRA by deleting the issue.

Tools / Unlink Selected Tasks- This function will unlink the Microsoft Project task from the JIRA issue.

Tools / Validate Selected Tasks – This function will validate that all of the linked tasks have valid JIRA issues associated with them.

Project Info – This dialog will show general summary information about the project plan.

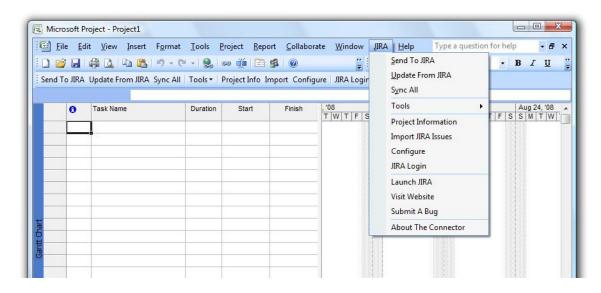
Import – This is a function that allows you to import JIRA issues into the current project plan.

Configure - View and modify configuration information for The Connector

JIRA Login / Logout - Login/logout to and from JIRA

The JIRA Menu

The Connector has a menu option that will appear between the Window and Help menu options on the main menu bar. From this menu, you can access all of the same functionality as the JIRA toolbar.



Logging Into JIRA / Logging Out of JIRA

The Connector requires a user to login before any functionality of The Connector can be used. Once an individual enters a valid username and password, (should be the same as their JIRA login), the plug-in will keep an active session open.

RA Login		2
The Connec	tor 1.2 for JIRA	
Provide a val authenticate	id JIRA username and password to to JIRA.	
æ	Username jdoe	
50	Password *******	
~~	🔽 Remember Last Login	

A user can optionally check the "Remember Last Login" option to have the plug-in default the last user name that was used to login to JIRA.

Once the user is logged in, the button text will change to "Logout" and pressing it will prompt the user to logout out. This can be used if you wish to deactivate the current session with JIRA.



Trial Version

The trial version of The Connector will display a trial screen before each option of the tool. To continue to use the trial version, simple press the "Continue with Trial" button. The trial version is fully functional for 30 days from the date of the installation.

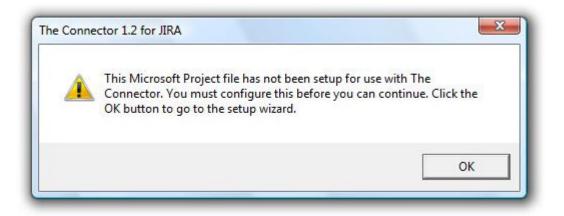
he Connector	×
The Connector - Trial Ver	sion
This is a trial version of The Connec	tor for Microsoft Project.
This trial version will function fo	r 30 days for evaluation.
To activate your version of this soft below and enter your product key.	ware, press the Register button
To learn how to purchase this produour website.	ict, simple click on the link to visit
http://www.the-connector.com	
Register	Continue with Trial

Once you purchase your copy of The Connector, you will receive a product registration key that can be entered into the register screen. Once registered, the product is fully functional.

legister The Conr	nector 🔘	
Provide the registration you have purchased the	key given to you after on the second secon	

Project Setup

Before using The Connector within a given project, it must be initialized through The Connector setup. This will automatically appear whenever trying to access JIRA functionality within an un-initialized project plan.



The plug-in will prompt you with the above message indicating that the project file has not been initialized. Click "OK" will take you to the Project Setup Dialog.

etup Wizard	
Setup Wizard	
	ctor with this project file, you must configure some he information below to continue.
JIRA Project Setup	
Default JIRA Project	(Optional)
	Browse Projects
The optional project specifie used for creating new issues	ed here will be the default project that gets
used for creating new issues	
Customize the locations used	to store JIRA information. If this default values configured will be used. Customize
Customize the locations used	default values configured will be used.

To setup a Microsoft Project file to use with The Connector, you must specify which of the Microsoft Project custom fields will be used to store the related JIRA issue information.

NOTE: The JIRA project is optional and may be left blank. If you specify a value here, new tasks will automatically be created under this project unless you override that value through the issue editor.

To select a project, you may either type in the project ID, or use the "Browse JIRA Projects" option to select a project from a list.

RA	Browse JIRA Projec		 	
	JIRA ID	Description	 Reset Columns	Refres
he sec sto orm	ORDSYS	Simple Order Management Simple Order Management		

Each project must be initialized with the custom fields built into Microsoft Project for storing the JIRA issue ID, JIRA issue status, JIRA issue type, JIRA issue priority and other JIRA data. There are 30 available text fields on each project task, but you may only use each field once.

NOTE: Different project files can have different configurations for these values. This allows for flexibility and customization as needed in case those custom fields are being used by other 3rd party or custom plug-ins. These options default based on what is configured under the "Configuration" dialog.

Once these values are provided, press the "OK" button and the project file will be initialized. Once initialized, there is nothing else that is needed to be done and you are able to use The Connector.

Configuration

The configuration dialog provided by The Connector allows for customization of a number of different parameters. You access these setting from the toolbar option "Configure".

JIRA Connectivity

This screen allows configuration of the endpoint to connect to JIRA. It can be an IP address or a domain address, depending on how you have configured your installation of JIRA.

JIRA Address	http://192.168.1.1		1	
		Configuration		5
	to the JIRA web se npany.com or http://			
JIRA Communic	tion Settings-			
	m date format map;	ping		
Use optim	ized issue and proje	ect browsing		
	ded web services		ore details	
		installation of the JI		
will allow for d	uration, timespent a	and percentage comp	plete data to be ex	changed.

The Connector does support communications over SSL. Simply provide the prefix of "https://" in the JIRA address field.

Advanced Configuration

The Advanced Configuration button under the JIRA Address allows The Connector to work over proxy servers and authenticated HTTP. To enable this functionality, press the button and configure the information that is requested.

Proxy Server HTTP Authentication		Proxy Server HTTP Authentication
Proxy Server Settings	1	Authentication
Connect to JIRA through a proxy se	erver	☐ JIRA server requires HTTP authentication
Address	Port	Username
-		Password
Proxy Authentication		
Proxy server requires authentication	in l	The JIRA server you are connecting to requires that you using
Username		basic HTTP authentication. Provide a username and password
	_	basic HTTP authentication. Provide a username and password here.
Username		basic HTTP authentication. Provide a username and password
Username		basic HTTP authentication. Provide a username and password

The Proxy Server settings allow you to specify the proxy server and port and then any authentication that your proxy server requires.

The HTTP Authentication tab allows you to specify the username and password that your web server requires.

JIRA Communication Settings

Use custom date format mapping – This option will allow you to map a date format string to a custom format. Use this function if you are running different languages between Microsoft Windows and Atlassian JIRA. *Example: If you are running a non-English version of Microsoft Windows and an English version of JIRA, the date formats do not translate correctly. Using this function will allow you to correct the translation.*

Date Mapping Settings			
Format String d-M	MM-yy		Test
Separator -		Not used value	NA
Adjustment			
January	Jan	July	Jul
February	Feb	August	Aug
March	Mar	September	Sep
April	Apr	October	Oct
May	May	November	Nov
June	Jun	December	Dec

Use optimized issue and project browsing – Using this option will replace the standard web service calls provided by JIRA with the custom calls developed for The Connector. Using these calls will increase the speed of the service calls to JIRA, especially in the cases where you have large numbers of projects and/or users in JIRA.

NOTE: This option requires the installation of Ecliptic Technologies extended web services for JIRA. See the section Enabling JIRA Web Services found on page 4 of this manual.

Use extended web services – This function will use the extended web services to calculate the percentage complete of a Microsoft Project tasks based on the worklogs. With this option disabled, The Connector will use the mappings configured under the "Mappings" tab of the configuration dialog.

NOTE: This option requires the installation of Ecliptic Technologies extended web services for JIRA. See the section Enabling JIRA Web Services found on page 4 of this manual.

Settings

The "Settings" tab of the configuration dialog allows you to setup some general configuration settings for The Connector.

JIRA Defaults Sync Settings About
nk field with the JIRA issue link
er project browsing
🔲 Use JIRA Environment Field
🔲 Use JIRA Custom Fields
A username
Text1 _
ally
name
name

Remember Last Login – This option will remember the username you specify between logins so you will not have to retype it.

Populate Microsoft Project Task Hyperlink field with the JIRA issue link -

This option will put a link in the task hyperlink field. This allows a quick single click link into JIRA to view the issue.

Cache the project list in memory for faster project browsing – After the first request to JIRA to retrieve the project list is made, it is cached in memory by The Connector as used for subsequent requests. This greatly increases the speed at which the project list is displayed. *NOTE: If you project lists changes frequently, you may not want to use this function. Typically the project list you work with does not change that frequently and the data is only cached until Microsoft Project is restarted.*

Use JIRA Components and Versions – If this option is enabled, you will see the components and versions tab on the issue editor and the import and sync functionality of The Connector will include these values.

Use JIRA Environment Field – If this option is enabled, you will see the environment tab on the issue editor and the import and sync functionality of The Connector will include these values.

Use JIRA Slave Project / Issue – The slave project / issue functionality of The Connector allows a single Microsoft Project task to be attached to two JIRA issues in two separate projects. This allows single updating of two sets of data during the synchronization option.

Use JIRA Custom Fields – This option enables the ability for The Connector to exchange custom field data with JIRA. When this option is available, a Custom Fields tab is available on the issue editor for setting values to be exchanged.

NOTE: This option requires the installation of the extended web services.

Resource Mappings – Resource mappings will allow you to use a mapping of your resource name to the JIRA username. You can store the JIRA username in a custom field of the resource. This allows you to have different resource names between JIRA and Microsoft Project.

The Resource Mapping lets you configure the JIRA user ID in either a custom field or using the Windows User Account.

NOTE: This option is only available in the Professional version of Microsoft Project.

Example: You may want your resource to be called "Bill Smith" in Microsoft Project, but Bill has a JIRA user login as "bsmith". Using the mapping functionality of The Connector will allow for this support.

When Automatically Creating Resources – This option will control how The Connector creates new resources when you import issues into Microsoft Project. There are three options that can be set.

1) Never create a resource entry automatically

If this option is checked, new resources will never be added to your resource list in Microsoft Project. If the resource exists and the option during the import is to assign the task, the resource will be set. Otherwise it is ignored.

2) Populate Resource Name with JIRA username

If doing an import and the resource does not exist, a new resource is automatically added and the resource name is assigned the JIRA user name.

3) Populate Resource Name with JIRA full name

If doing an import and the resource does not exist, the new resource is automatically added and the resource name is assigned the Full Name of the resource which gets pulled from JIRA. The JIRA username is stored in the field that is configured in the Resource Mapping section.

NOTE: This option is only available if you are using the Resource Mapping option.

Options

The "Options" tab of the configuration dialog allows you to configure various mapping options of The Connector..

JIRA Connectivity Settings Options Mappings JIRA D	efaults Sync Settings About
- Default JIRA Mappings	
Configure the default customf ield mappings that The project sheet is initialized. These settings control where JIRA data is stored.	
🔽 Use Microsoft Project Enterprise Text Fields	Configure
The advanced field mapping option allows you to control where values are stored in Microsoft Project.	Setup Advanced Field Mappings
-Time Unit Mappings	
Time unit mappings allow you to control	Configure Time Unit Mappings
the value of Month, Day, Week in non- English versions of Microsoft Project.	
-Import Profile Sharing	
🔽 Enable Import Profile Sharing	Configure Directory
	OK Cancel

Default JIRA Mappings

The Connector allows you to setup default mappings that will get used whenever creating a new project plan. There are 5 fields that must be mapped for The Connector to function. These fields include the first 5 listed on the screen.

Required Mappings Issue ID Project ID Issue Type Issue Priority Issue Status

Basic Mapping Custom Fields Specify the storage locations optional.		me of the values are re-	quired, others are
Reset to Defaults	Default All		
Required JIRA Mappings			
Issue ID (Required)		Text1	
Project ID (Required)		Text2	Ţ
Issue Type (Required)		Text3	•
Issue Priority (Required)		Text4	•
Issue Status (Required)		Text5	•
Optional JIRA Mappings			

All of the other fields that The Connector has available to map are optional. You can choose to use them if you wish. Microsoft Project as a limit of 30 text fields that can be used in these mappings, but you are free to mix and match what ever fields you desire.

If you have Custom Fields enabled, you will get an additional tab on the mappings for configuring these fields.

asic Mapping Custom Fields			
Specify the storage locations optional.	of JIRA information. Sor	ne of the values are rec	quired, others are
Reset to Defaults	Default All		
Reporter		Text7	•
✓ Parent Issue ID (Required	if using sub-tasks)	Text8	•
Component / Versions / En	wironment Mappings		
Environment		Text9	_
Component/s		Text9 Text10	<u> </u>
Affects Version/s		Text11 Text12 Text13	
✓ Fix Version/s		Text14 Text15 Text16	+ -
		OK	Cancel

The optional fields on the mapping dialog will have a checkbox and a drop down list of the available text locations. To enable a specific field, simply check the field you wish to map and select a text location from the drop down list.

Each text location can only be used once. The Connector will validate that you do not have this value duplicated anywhere in you configuration.

Reset to Defaults

This button will reset your mappings to a default state selecting the first 5 required fields and disabling others.

Default All

The default all button will automatically assign all of the available fields to the first available configuration text location.

Use Microsoft Project Enterprise Text Fields

If you are using Microsoft Project Professional with Microsoft Project Server, you can enable this option which will allow you to store custom data in the enterprise fields of Microsoft Project Server. This information will be stored on the Project Server and can be used in a team collaboration environment.

lasic Mapping Custom Fields Specify the storage locations optional.	and the second	me of the values are required	d, others are
Reset to Defaults	Default All		
Required JIRA Mappings			
Issue ID (Required)		Text1	•
Project ID (Required)		Text27 Text28 Text20	
Issue Type (Required)		Text29 Text30 EnterpriseText1	
Issue Priority (Required)		EnterpriseText2 EnterpriseText3	
Issue Status (Required)		EnterpriseText4	
Optional JIRA Mappings			

If this option is checked, you will notice options in the drop down list of the mapping for EnterpriseText fields. These correspond to storage locations for Microsoft Project Server.

Advanced Field Mappings

The Advanced Field Mappings configuration allows control over the how due dates and durations get mapped during the data exchange with JIRA.

The General Field Mappings allow you to control where you want the JIRA due date to get stored. Options are to store that value in the Task Deadline field or the Date End Date.

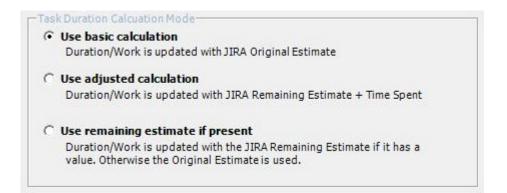
IRA Co	onnectivity Settings Options Mappings JIRA Defaults Sync Settings About
1000	Advanced Field Mapping
Ct of pr JI F Ad Th all sti Tir th En	General Mappings Duration and Work General Field Mapings Configure which places information is updated in Microsoft Project with the specific JIRA information Map the JIRA due date to Task Deadline
	OK Cancel

-	Settings				its byrics	Settings Abo	
Advanced F	ield Map	ping					
Adjusti estima ti in Cus D Cus	uration Ca ing the Du te and wo uration Ca ise basic o uration/W ise adjust uration/W ise remain uration/W	Map the JI Map the JI Map the JI alcuation M calculation Vork is upd vork is upd hing estim Vork is upd	appings I Work values. JIRA estima RA time spo ode lated with J lated with J lated with J lated with spre	ate value to ent value to IRA Original JIRA Remain sent	Task D Task Ar Estimate ing Estima	o store the iss uration ctual Duration te + Time Spe imate if it has	ent

The Duration and Work tab allows you to configure where the estimate and work log values get mapped to. These values can get mapped to Microsoft Project's actual work/duration fields or planned work/duration fields, depending on your usage.

Seneral Mappings Duration and Work		
Duration and Work Field Mappings		
Adjusting the Duration and Work values will contro	I where to store the issue	e
estimate and work log times.		
estimate and work log times. Map the JIRA estimate value to	Task Duration	•
	Task Duration Task Actual Duration	•
		•

The Connector support 3 different calculation modes for calculating the percentage complete of a task.



Basic Calculation - this will simply map the JIRA original estimate value to the duration or work field (depending on your configuration).

Adjusted Calculation – The adjusted calculation mode will take the JIRA remaining estimate and add it to the time spent on the task to calculate the new duration of the task. This mode is used if you wish to have our project plan updated with values that represent the "current" time estimate of a task. For example, a task may be originally estimated at 6 hours, but after 2 hours are spent, it gets updated with a remaining estimate of 2 hours. After the update is done, your project plan will reflect the 4 hour task estimate (2 hours remaining + 2 hour spent).

Use remaining estimate if present – This option is used if you wish to have your project plan update to reflect the "remaining effort" necessary to complete the tasks. From a scheduling standpoint, you may wish to only work against what is known left to complete. With this mode, your Microsoft Project tasks will get updated with a duration of what is left to complete the task (JIRA remaining estimate).

Unit mapping				
ector to repre	esent minutes	, hours and day		
upport non-E	nglishversion	is of Microsoft P	Project.	
				Mappings
ne Units	1.00			
Minutes	m			
Hours	h			
Dave	d			Mappings
Days	la la			
			11	
		OK	Cancel	
	upport non-E ne Units Minutes	upport non-English version ne Units Minutes m Hours h	upport non-English versions of Microsoft P ne Units Minutes m Hours h	Minutes m Hours h

The time unit mappings are used for non-English versions of Microsoft Project. Various languages with use different "codes" to represent minutes, hours and days than the English version does. Configuring these values allow you to control these settings.

Enable Import Profile Sharing

Import profile sharing allows you to specify a network location and store saved import profiles. Groups of users can all access the same location and re-use the saved profiles.

S	Import Profile Sharing will allow y be accessed by other users. This users to re-use and share commo	allows a tea	m or group of
	e path to shared directory		
Path			Browse
		etwork drive	that all

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Mappings

The "Mappings" tab is used when running The Connector in standard mode. The mappings allow you to configure the Microsoft Project task percentage complete with each JIRA status. When you sync the project file with JIRA, it will update the percentage complete of the project plan based on the status.

Example: If the JIRA issue is marked "In Progress", the Microsoft Project task will show as 50% complete.

A Connectivity Settings Opt	tions Mappings JIRA Defaults Sync Settings About
he JIRA mappings will map a l	Microsoft Project percentage complete to ettings as desired from this screen.
In Progress	50 🕂 %
Open	0 🛨 %
Closed	100 🕂 %
Resolved	95 🕂 %
Reopened	50 🕂 %
Map percent complete if f the percentage provided by extended worklog calculation,	the mapping above is greater than the

When using The Connector in extended mode, these mappings are not used and the work logs provided in JIRA are used to calculate a more accurate percentage complete.

JIRA Defaults

The "JIRA Defaults" tab allows you configure the default issue type, priority and status when new JIRA issues are created. You can configure the defaults to "Warn and require manual entry" however if you do this, you will be required to manually pick these settings from the JIRA Issue Info dialog before the task will be used to create a new JIRA issue.

RA Connectivity Settings Options Default JIRA Values		
Specify the default values that wi	Il get used to create new	JIRA issues.
C Warn and require manual entr	y 🗭 If blank, use the de	fault value below
Default Issue Type	Improvement	<u> </u>
Default Issue Priority	Blocker	<u> </u>
Default Issue Status	Open	_
Default Subtask Type	Sub-task	-

The drop-down boxes provide a list of all the current configured settings in JIRA. If you add a custom issue type to JIRA, this issue type will be available for selection in the drop-down.

NOTE: JIRA projects can have different issue types available under each project. The list on this configuration screen shows all of the issues setup in JIRA. So even though you may have an issue type as an option, it may not be valid in JIRA and may cause errors when creating and/or syncing.

The "Sync" tab of the Configuration dialog allows you to setup default values for the Send To JIRA, Update From JIRA and Sync All functions.

IRA Connectivity Settings Options Mappings JIRA Defa	aults Sync Settings About
-Send To JIRA Defaults	
Default to automatically create JIRA issues	
Default to automatically update slave issues	
Of Default To Send All Tasks	
C Default To Send Only Selected Tasks	
-Update From JIRA Defaults	
Default To Update All Tasks	
C Default To Update Only Selected Tasks	
-Sync All Defaults	
Default to automatically create JIRA issues	
🔲 Default to automatically update slave issues	
	OK Cancel

About

The "About" tab on the Configuration dialog will show information about the version of The Connector that is being ran. It provides links to support requests and The Connector website.

nfiguration	X
IIRA Connectivity Settings Options Mappings JIRA Defaults Sync Settings About	
Registered Version	
The Connector provides a bridge between Microsoft Project and Altassian JIRA allowing quick transfer of information in both direction.	
Check Web Services	
Version 1.2 Build 3141	
Copyright 2007-2008 Ecliptic Technologies, Inc. ALL RIGHTS RESERVED WORLDWIDE	
<u>http://www.the-connector.com</u> <u>support@ecliptictech.com</u>	
OK Cancel	1

The "Check Web Services" button allows The Connector to ask the JIRA plugin for its version. It is a quick and easy way to verify what version of The Connector plugin you have installed at the specific JIRA address.

Ecliptic Technologies JIRA Web Service Exten	sions v1.2
Γ	ок
L	
	Ecliptic Technologies JIRA Web Service Exten

Send To JIRA

The "Send To JIRA" option allows you to push information to JIRA from Microsoft Project. To use this function, select the tasks from the project plan that you wish to push to JIRA. You can select any number of tasks that you want to have synced with JIRA.

Ei	le <u>E</u> dit	t <u>V</u> iew <u>I</u> nsert	Format <u>T</u> ool	s <u>P</u> roject <u>R</u> eport <u>C</u> ollabora	te <u>W</u> indow	JIRA <u>H</u> elp	Ту
) 🖻	7 🖬 🛙	🖨 🖪 🖪 😤 I	19 = (1 =) ee 💥 🖹 🕵 I 📀	¥.	🗧 🌳 <u>S</u> how -	Arial
end 1	o JIRA	Update From JIRA	Sync All Tools	• Project Info Import Configu	ire JIRA Logout		
	0	JIRA Issue ID	JIRA Project ID	Task Name	Deadline	Duration	Resource Name
1		JIRAIGNORE		- Development	NA	14 days	
2		JIRAIGNORE		- Customer Management	NA	12 days	
3		ORDSYS-36	ORDSYS	Add A New Customer	Wed 10/31/07	2 days	user2
4		ORDSYS-37	ORDSYS	Edit A Customer	NA	2 days	user2
5		ORDSYS-38	ORDSYS	Delete Customer	NA	2 days	user2
6		ORDSYS-39	ORDSYS	List Customers	NA	2 days	user2
7		ORDSYS-40	ORDSYS	Search Customers	NA	2 days	user2
8		ORDSYS-41	ORDSYS	Customer Report	NA	2 days	user2
9		JIRAIGNORE		Order Management	NA	14 days	
10		ORDSYS-42	ORDSYS	Create Order	NA	2 days	user3
11		ORDSYS-43	ORDSYS	Edit Order	NA	2 days	user3
40		0000000	00000	511 S.	···		

If you have new issues in your plan that are not associated with JIRA issues, and you have the option to "Automatically create JIRA issues if the task is not linked" option checked, the Send To JIRA function will try to create a new issue.

It will use the default project that setup during the initialization process. The project ID can be overridden using the issue editor to pick a different project other than the default.

Issue type, priority and status are defaulted from the configuration screen. If the configuration option is set to "Warn and require manual entry", you will have to set those values before it can be successfully created.

Warn and require manual entry	y 🙃 If blank, use the dei	fault value below
Default Issue Type	Improvement	•
Default Issue Priority	Blocker	•
Default Issue Status	Open	•
Default Subtask Type	Sub-task	-

JIRA requires some basic information to be provided for you to create a new issue. If The Connector detects that you are missing some information, you will get the following dialog to appear. This dialog will give you the ability to provide the values for creating the issue.

A. Please provide th	equired data for crea at information below	
rovide Missing Data Create a Require	ements Document	
Project ID		Browse Projects
Issue Type	Task	•
Priority	Trivial	•
Status	Open	-
lact the 'Skip' button	if you wish to skip th	is issue and not have it created.

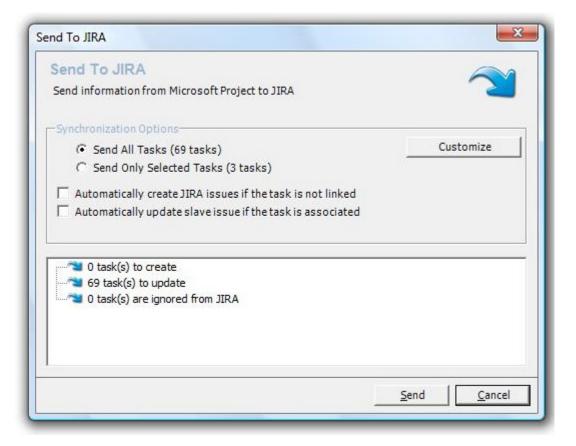
You can use the Browse Projects function to get a list of available projects to select. Use the "Apply to all during the current process" will use the settings you specify for any other tasks that are missing information.

If an error occurs during the creation process, the error message from JIRA will get displayed in a list that you can review and correct.

Issue ID	Message		
⊗ Not yet assigned	Send To JIRA: Missing data - issue skipped	at Ecliptic	

When you press the "Send To JIRA" option on the toolbar (or select it from the menu), you will get the option dialog. You can either choose to send selected tasks or send all tasks. If you choose to send only selected tasks, only those tasks highlighted in Microsoft Project will be sent.

If you uncheck the "Automatically create JIRA issues if the task is not linked" option, any tasks that do not have an associated issue ID will be skipped over.



If you are using "Slave" issues, you can choose the option to automatically update the slave issue as well. A slave issue is a secondary issue that can be associated with a single task and updated at the same time as the primary task. After the function has completed, you will be given a confirmation screen showing the number of tasks that were successfully sent to JIRA.

Send To JIF	AS AS
Send information	on from Microsoft Project to JIRA
-Send To JIRA -	
Sending ETIBL	ASTER-19
	e been successfully updated e been successfully created
Error List (Click f	or details)
Issue ID	Message

Any errors that have occurred during the process will be listed in the "Error List" at the bottom of the screen. The process does not stop when an error is encountered, so if you have 10 tasks you are sending to JIRA, and two fail, the 8 remaining will successfully update.

You can also customize the data that is sent to JIRA by selecting the "Customize" button on the Send To JIRA dialog.

Send All Tasks (69 tasks)	Customize
C Send Only Selected Tasks (3 tasks)	
Automatically create JIRA issues if the task is not linked	

This displays a dialog will all of the pieces of data that are exchanged in the process. You can control which pieces of data get sent to JIRA from here.

If you do not want to update the Due Date (for example) on the JIRA issues, you can uncheck that option and after the process completes, the Due Date values in JIRA will remain the same as they were before the process began.

Select All	will be sent to JIRA and used for upda	ung the site issue.
Standard Fields	om Fields	
✓ Include Environm	ient	<u>^</u>
☑ Include Fix Versi	on	E
☑ Include Affects V	ersion	
✓ Include Compon	ents	
☑ Include Reporter		
		
	uch as issue type, status, priority, su ig new issues. These values will be us ting issues.	

This gives The Connector a lot more control over configuring how you need the data exchange to work.

If you have custom field support enabled, you will also see a tab for "Custom Fields". This will allow you to specify which custom fields you wish to exchange with JIRA.

elected information will be s	Jnselect All	1	
tandard Fields Custom Fields	s	-	
✓ Include Customer Email			
Include End Date			
Include Start Date			
☐ Include Tracking Code			
OTE: Certain values such as in rerequired for creating new is rese settings for creating issu	ssues. These va		

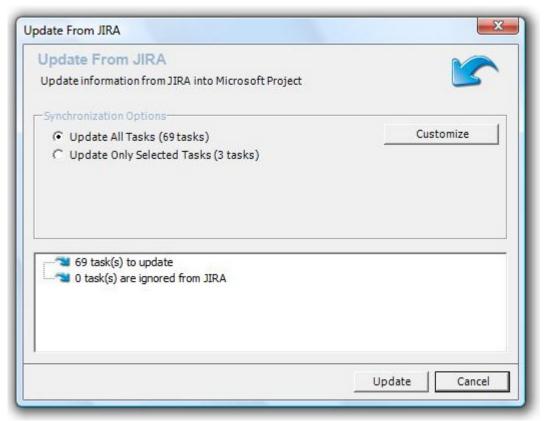
Any changes to these settings will be saved and used for all future actions. If you wish to make a change for only the current action, you can select the "Use these settings for only this update" and your changes will not be remembered.

Update From JIRA

The "Update From JIRA" option allows will pull information from JIRA for the currently selected tasks. This will allow you to individually update selective portions of your project plan. To use this option, highlight the tasks you wish to have updated and press the "Update From JIRA" toolbar button.

	e <u>E</u> dit	<u>V</u> iew Insert	Format Tool	s <u>P</u> roject <u>R</u> eport <u>C</u> ollabora	te <u>W</u> indow	JIRA <u>H</u> elp	Ту
0 🖻	i 🗖 🛛	🛱 🙆 🗈 🛍 🕻	17 - (1 -) => 💥 🖹 🕵 📀	¥.	🗧 🌳 <u>S</u> how -	Arial
Send T	o JIRA	Update From JIRA	Sync All Tools	• Project Info Import Configu	re JIRA Logout		
	0	JIRA Issue ID	JIRA Project ID	Task Name	Deadline	Duration	Resource Name
1		JIRAIGNORE		Development	NA	14 days	-
2		JIRAIGNORE		- Customer Management	NA	12 days	
3		ORDSYS-36	ORDSYS	Add A New Customer	Wed 10/31/07	2 days	user2
4	۱.	ORDSYS-37	ORDSYS	Edit A Customer	NA	2 days	user2
5		ORDSYS-38	ORDSYS	Delete Customer	NA	2 days	user2
6	2	ORDSYS-39	ORDSYS	List Customers	NA	2 days	user2
7	2	ORDSYS-40	ORDSYS	Search Customers	NA	2 days	user2
8	۹.	ORDSYS-41	ORDSYS	Customer Report	NA	2 days	user2
		JIRAIGNORE		Order Management	NA	14 days	
9	1.00	UNUGHONE					

You can choose to Update All Tasks or Update Selected Tasks. If you update all, every task that is linked to a JIRA issue will get updated. If only selected tasks is chosen, only those tasks that are highlighted will get updated.



You will get a confirmation screen for each of the successfully updated tasks.

Update Fro	om JIRA ation from JIRA into Microsoft Project	5
-Update From 1	JIRA	
	JIRA sucessfully completed.	

13 issue(s) hav	ve been successfully updated	
Error List (Click)	for details)	
	for details) Message	
Error List (Click) Issue ID		

Any errors that have occurred during the process will be listed in the "Error List" at the bottom of the screen. The process does not stop when an error is encountered, so if you have 10 tasks you are updated from JIRA, and two fail, the 8 remaining will successfully update.

You can also customize the data that is sent to JIRA by selecting the "Customize" button on the Update From JIRA dialog.

Update All Tasks (69 tasks)	Customize
C Update Only Selected Tasks (3 tasks)	

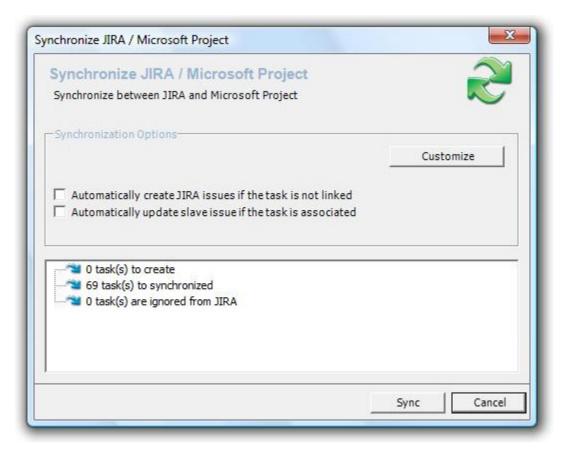
This displays a dialog will all of the pieces of data that are exchanged in the process. You can control which pieces of data get update from JIRA from here.

Depending on the use case you are using The Connector for, you have flexibility to control how the synchronization works. If, for example, during the update, you wish to have any description changes reflected in your project plan, you can choose to have that piece of data update during this process.

Select All	Unselect All	
tandard Fields Cust	om Fields	
✓ Include Affects V	ersion	
Include Assignee		E
✓ Include Compon	ents	
✓ Include Description	on	
✓ Include Due Date	5	
		

Sync All

The Sync All function will synchronize all the project tasks in the currently open project plan with their corresponding JIRA issues. If there are new tasks, new JIRA issues will be created.



Automatically create JIRA issues if the task is not linked

If you do not want The Connector to create new issues for new project tasks, you can uncheck this option. Doing so will prevent The Connector from creating this issues.

Automatically update slave issue if the task is associated

If you are using the Slave issue functionality, this process will update both the primary issue and any slave issue that is attached to the task.

You can also customize how the synchronization works by pressing the "Customize" button on this Sync All dialog. This displays a dialog will all of the pieces of data that are exchanged in the process. You can control which pieces of data get update from JIRA from here.

In the customization of the sync all process, you can pick which system is the primary source of data. During the sync all, two steps are done, 1) data is sent over to JIRA and 2) data is pulled back into Microsoft Project. Depending on the use case, you can customize this process for various uses.

Under a typical scenario, one might wish to have Microsoft Project be the master for things like description, durations, due dates, etc. If some one does change this data in JIRA, during the next sync process, the date will be reset. This allows a project manager control over these values.

Likewise, certain data like the status of the issue (which typically gets updated by a developer) would get pulled back into Microsoft Project and you would set JIRA as the master.

Customize what data is exchanged with JIRA u elected information will be sent to JIRA and u Exclude All	ised for updating the JIR/	A issue.
Standard Fields Custom Fields		
Affects Version	JIRA	•
Assignee	JIRA	•
Components	Exclude	
Description	MS Project	
Due Date	Exclude	
Duration	Exclude	-
Environment	Exclude	•
1		

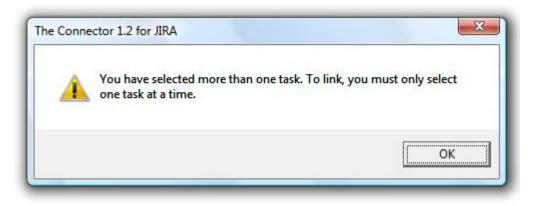
In the Customize JIRA Sync dialog, you can select how each piece of data gets handled. One of three options can be chosen:

- 1) JIRA JIRA is the primary source of data and after this process, Microsoft Project will get updated with the value from JIRA.
- 2) MS Project Microsoft Project is the primary source of data and after this process, whatever value is in Microsoft Project will get updated in JIRA.
- Exclude The data is ignored and after the process, Microsoft Project will have whatever value it started with and JIRA will have whatever value it started with.

Link Issue

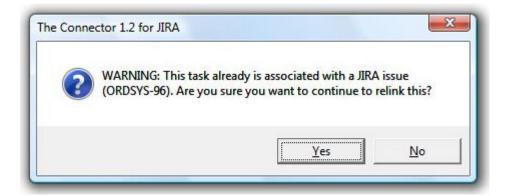
The "Link Issue" function will allow you to link existing project tasks with existing JIRA issues. This function is useful when you have tasks that have already been created in JIRA and/or are trying to repair a project plan that has been corrupted and build a complex project plan from issues that already exist.

To use this function, select one and only one task from your project plan. If you select multiple tasks, you will receive the message below.



The "Link Task To Existing JIRA Issue" dialog will appear. Simply type in the JIRA issue you wish to link to or use the "Browse JIRA Issues" to select the issue and press the "Link" button. You project task will then be linked to the specified JIRA issue.

ink Task To Existing JIRA Issue	e 🔍
Link Task To Existing	JIRA Issue
This tool will let you link your task to an existing JIRA issue. id in the box below.	
Issue ID	Browse JIRA Issues



69 issues foun	d.		Res	et Columns	Refresh
JIRA Project	ORDSYS Br	owse Projects			
Issue Type	Include All Issue Types	•			
Issue Status	Include All Statuses	▼ Iss	ue Priority	Include All Priorities	•
JIRA ID	Description				
ORDSYS-102	Another subtask				
ORDSYS-101	New subtask				
ORDSYS-100	Test the task				
ORDSYS-99	Another sub task				
ORDSYS-98	Sub task test				
ORDSYS-97	This is a sub task.				
ORDSYS-96	Create Edit Customer Scree	en			
ORDSYS-95	Create Add New Customer	Screen			
ORDSYS-94	Subtask				
ORDSYS-93	Here is a new task				
ORDSYS-87	123123123				E
ORDSYS-86	The full description				-

Issue Editor

This issue editor is a dialog provided by The Connector for quickly and easily editing all of the information related to the issue in one place. From this dialog, you can also send and update the information from JIRA. From this window, all the attributes of the task/issue can be adjusted including all the custom field values, versions and components, sub-task information and slave issue links.

Seneral Issue Information ssue ID: ORDSYS-96	Project ID: ORDSYS 🥑 L	ink 🛛 🗂 JIRA Ignored
Summary Create Edit Customer Screen		
<< Previous Next >> << Previous Selected	Next Selected >>	Send To JIRA
View JIRA Issue		Update From JIRA
Percentage Complete: 0% <u>Click to Analyze</u>		Update Group
Description General Components / Versions Environment Custo		A
		•

To exclude an issue from the JIRA sync, check the "JIRA Ignored" option in the upper right corner. If this option is chosen, this specific task will be skipped over whenever a JIRA data exchange is performed.

You may also use the "View JIRA Issue" link to directly go to JIRA to view more details about the issue.

The Description text box on the first tab of the issue editor allows a place for you to modify the issue description. This information is stored in the "Notes" field of the Microsoft Project task and can also be edited through that screen.

ssue ID: ORDSYS-96	Project II	: ORDSYS	JIRA Ignored
Summary Create Edit Customer Screen			
<< Previous Next >> <<	Previous Selected Next	Selected >>	Send To JIRA
View JIRA Issue			Update From JIRA
Percentage Complete: 0% <u>Click to An</u>	alyze		Update Group
Due Date 8/11/2008 - Superior State	Issue Priority Issue Resolution	Major	• •
-Sub-Task You must have the Parent Issue ID fi	ield mapping configured to use	sub-tasks.	

Under the "General" tab of the issue editor, you can modify all of the basic properties of the issue such as it type, priory, status, assignee, and due date.

If you wish to make this task a sub-task, you this can also be set form this screen (See the Using Sub Task section of this document for more information).

Summary Create Edit	: Customer Screen	
<< Previous	Duration Calculation Analyzer	Send To JIRA
View JIRA Issue Percentage Complet Description General General JIRA Inform Assigned To Reporter Jue Date View Jissue has r	Calculuation Mode: Basic Calculation Hours Per Day: 8 Issue Original Estimate: 0 minutes Issue Remaining Estimate: 0 minutes Issue Time Spent: 0 minutes Time spent is calculated as 0 minutes Hours per day set to 8 Time spent mapped to the Duration field.	View JIRA Issue
-Sub-Task You must have		Close

Use the "Click To Analyze" button to have The Connector show you details on how it had calculated your task duration. This functionality can be helpful to determine/debug how you settings are affecting your JIRA data for time tracking.

See the section on configuration the calculation modes under the "Configure" section of The Connector. The various calculation modes of The Connector can cause different duration values to get used.

The Components – Versions tab of the issue editor will allow you to select which components, affects versions and fix versions that the issue is associated with.

ssue ID: ORDSYS-96	830/07	ject ID: ORDSYS	k 🗍 JIRA Ignored
<< Previous Next >>	<< Previous Selected	Next Selected >>	Send To JIRA
View JIRA Issue			Update From JIRA
	lick to Analyze		Update Group
2 T 2 C 2 C 2 C 2 C 2 C 2 C 2 C 2 C 2 C	Version 1.0	Version 1.0	
Order Management Customer Management	Version 2.0 Version 1.1 Version 1.0	Version 2.0 Version 1.1 Version 1.0	

If this option is enabled under the configuration dialog, you will have the ability to view this tab. Select the desired components and versions and when the issue is synchronized with JIRA, this data will be transmitted and updated.

The Environment tab of the issue editor will allow you to edit the environment value of the JIRA issue. This tab is only visible if you have enabled this option through The Connector's configuration dialog.

NOTE: You CANNOT use tab or carriage returns in the environment field and you can only store 255 characters. This is a limitation to the storage location in Microsoft Project.

eneral Issue Information sue ID: ORDSYS-96	Pr	roject ID: ORDSYS	& Link	IIRA Ignored
Summary Create Edit Customer Screen				
<< Previous Next >> < Previo	ous Selected	Next Selected >	>	Send To JIRA
View JIRA Issue				Update From JIRA
ercentage Complete: 0% <u>Click to Analyze</u>				Update Group
Description General Components / Versions Environ NOTE: When using the envirnoment field in The Com characters. This is a limitation of the storage ability Configuration dialog.	nector, you are limite	ed to 255 characters	and cannot u	
NOTE: When using the envirnoment field in The Con characters. This is a limitation of the storage ability	nector, you are limite	ed to 255 characters	and cannot u	

Summary Create Edit Customer Screen	Project ID: ORDSYS	k 🗍 JIRA Ignored
<< Previous Next >> <<	< Previous Selected Next Selected >>	Send To JIRA
View JIRA Issue		Update From JIRA
ercentage Complete: 0% <u>Click to Ana</u>	alyze	Update Group
	10:35 PM	<u>.</u>
Start Date Provide the start date that the developer should work on this issue	8/11/2008	
WORK ON UNS ISSUE.	Good	=

The Connector supports Custom Fields in JIRA and allows you to exchange this information in both directions. From the "Custom Fields" tab of the issue editor you can view and set the values for custom fields. Most of the standard JIRA custom fields are supported by The Connector and allow for their native types to be edited through The Connector.

If your custom field is a multi select list box, The Connector show you a multi select list box and allows you to select multiple values. Date/time fields are show in The Connector using the Windows date selector.

Only show configured custom fields

Your JIRA instance can have more custom fields setup than you wish to use in The Connector. If you only configure The Connector to use 3 of those custom fields, checking this option will limit the fields you see to the configured fields. This is useful if you have a large number of custom fields setup in JIRA but don't want or need to see them from within Microsoft Project.

Group Update

The Group Update function of The Connector allows you to update multiple tasks with the same value. From this screen you can update a number of selected tasks at one time.

date button to update the entir	ising the group update function. Simply set the value e group.	
<< Return To Issue		
Update Project	Select Project	Update
Update Assigned To	•	Update
UpdateReporter		Update
Update Due Date	8/11/2008 🔽	Update
Update Issue Type	•	Update
UpdatePriority	_	Update
Update Status	•	Update

To use this option, select the desired tasks you wish to update, choose Tools -> Issue Editor and press the "Group Update" button. From this screen, select the piece of data you wish to change, enter the value and press the "Update" button that is located next to the input box.

Task Browser

The issue browser is a utility that allows you to quickly and easily manage multiple tasks at the same time.

Select / Unselect	All Filter View	Show All Project Tasks	<u> </u>
JIRA Issue ID	Description	Status	
ETIBLASTER-14 ETIBLASTER-28	Email Marketing Tool Configuration Email list - Bugs when switching pages of	the different e	
ETIBLASTER-13 ETIBLASTER-12 To Be Created	View Statistics Email Marketing Tool Manager Write up Detail Design Document	(New)	
ETIBLASTER-8 ETIBLASTER-16	Write up Functional Design Document Manage Recipients Page		
ETIBLASTER-3 To Be Created To Be Created ETIBLASTER-23 ETIBLASTER-19 ETIBLASTER-21	Mailer Service Add/Edit Campaign Statistics page Manage Attachments Manage Categories Email Tracker	(New) (New)	
Exclude Sel	ected Tasks Unattach Se	elected Tasks	View / Edit Selected

Using this utility, you can Control+Click multiple tasks and highlight them.

Exclude Selected Tasks from JIRA

This option will exclude all of the selected task from JIRA so that during the syncing processing, these tasks will be ignored.

Unattach Selected Tasks From JIRA

This view will also allow you to filter be different options using the drop down box in the upper right corner of the dialog. This will allow you to see which of your project tasks are unassigned, ignored, etc.

Double clicking on a task will take you directly to the "Issue Info" dialog where you can make changes if needed.

Mark As JIRA Ignored

The Mark As JIRA Ignored function allows you to select multiple tasks in your project plan and mark them all as JIRA Ignored. JIRA Ignored tasks will be skipped over when The Connector synchronizing data between JIRA and Microsoft Project.

Remove Selected From JIRA

The Remove Select From JIRA function will delete tasks from JIRA. If the task in Microsoft Project is linked to a JIRA issue, selecting that task and executing this function will delete the issue from JIRA.

WARNING: This removes the issue from JIRA and all data associated with the issue will be unrecoverable.

Unlink Selected From JIRA

The Unlink Selected FROM JIRA will detach the Microsoft Project task from the JIRA issue. This does not remove the issue from JIRA, but simply unassociates the two. You can use the link issue function to reattach if you need.

Validate Selected Tasks

The Validate Selected Tasks function will attempt to validate each attached task by attempting to load the JIRA issue. This function can be used to verify that your Microsoft Project plan is connected to valid issues.

Project Info

The Project Info dialog of The Connector provides access to general information the current project.

The General tab displays the filename of the project and provides a comment section where you can enter some description and/or comments about this file.

eneral Statistics Project Settings	
- General Project Information Provide a general description for	this project plan. You can enter up to 128 characters.
Project Name: Project1	
	OK Cancel

The statistics tab of the Project Info dialog shows some general counts about the current project file. It will show the total number of tasks, total JIRA projects, total JIRA issues, and the total number of tasks that are marked as JIRA ignored. This provides you with an overview of the project file.

roject Info	X
General Statistics Project Settings	
Project Statistics	
Total Tasks	69
Total JIRA Projects	1
Total JIRA Issues	69
Total Tasks Ignored from JIRA	0
	OK Cancel

The Project Settings tab of the Project Info provides a way to change the settings that were used to initialize the project file. This includes the default JIRA project (which gets used as the default when new issues are created) as well as all the custom fields that are used to store the JIRA values.

You can change these values once a file has been initialized, however doing so will confuse The Connector as it looks in certain places for project Ids and issue Ids.

ctive project plan. Yo I.	u can add or
	u can add or
Stands Territor - 11 (1917)	
rojects	
ult project that gets (used for creating
ect plan has been	initialized will
3	Projects

IIF F	Field Mappings		
Ai ch	Basic Mapping Custom Fields Specify the storage locations of JIRA information.	Some of the values are req	uired, others ar
De	Reset to Defaults Default All		
	Required JIRA Mappings		
	Issue ID (Required)	Text1	•
The	Project ID (Required)	Text2	•
ine.	Issue Type (Required)	Text3	-
	Issue Priority (Required)	Text4	
AU	Issue Status (Required)	Text5	-
-	Optional JIRA Mappings		

Using the "Modify Mappings" option will allow you to change the store locations that The Connector uses to place JIRA data. This is different from the Configure screen setting which are merely the defaults.

The Connector supports the ability to have different settings on each project file, so once a project is initialized, it settings much be adjusted through here, not through the defaults.

Advanced Import

The import utility allows you pull JIRA issues into your Microsoft Project plan. The Connector provides a robust import wizard with a large number of parameters to control how you issues are brought in.

When you select "Import" from The Connector toolbar, you will get the start of the Import wizard.

JIRA to Microsoft Project Advanced Import	
Welcome to the JIRA to Microsoft Project Advanced Import utility. This utility allow import issues from JIRA directly into Microsoft Project. You can order, group, filter issues when you import them.	
Start with a blank import profile	
O Use the last specified values	
C Select from a previously saved import profile	
Select preconfigured import profile	
Select Import Profile	
Remember the last used profile	
Remove Import Profile	
 << Back Next >> Import	Car

Start with a blank import profile

This will start with a blank profile that you can configure with the options you wish. Press the "Next >>" button to continue through the wizard.

Use the last specified values

This allows you to quickly perform an import using the last values that you specified. This is helpful if you constantly import issues using the same settings.

Select from a previously saved import profile

At the end of the wizard, you are able to name and save the profile for future use. Selecting this option will allow you pick from the list of previously saved profiles.

	Microsoft Project Advanced Import urce for the import. You can selected multiple projects or multiple JIRA filters.
Select from JIRA	A Projects C Select from Saved Filters
	Business Users
ORDSYS	Simple Order Management System
	er a project header
A headertack w	ill be created in Microsoft Project and all issues from the project I and indented in the Microsoft Project task list.

The second tab of the wizard allows you to pick which project or filters you wish to use for the import. The Connector does allow you to setup a filter within JIRA and import using that filter.

NOTE: The import can either choose multiple projects OR multiple filters but cannot choose a project and a filter.

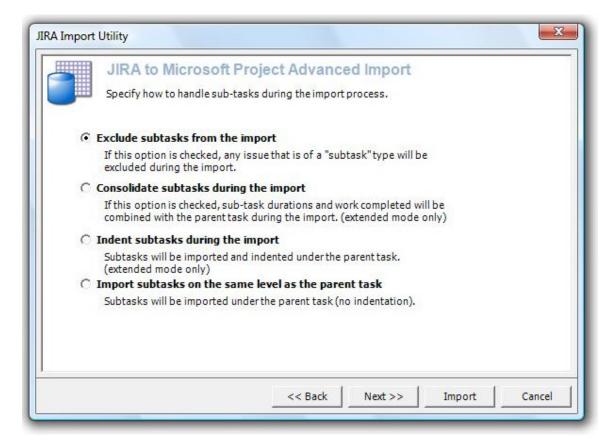
Group tasks under project header

If this option is checked, a header task in Microsoft Project will get created with the name of the project and tasks indented under the project.

	0	Task Name	Duration	Start	Finish	Pre
1		- NSSO	2.16 days	Thu 9/11/08	Mon 9/15/08	
2	V 68	Issues entering transfers	10 hrs	Thu 9/11/08	Fri 9/12/08	
3	V 6 .	See where numbers come from or	90 mins	Thu 9/11/08	Thu 9/11/08	

	Project Advanced Import ort. You can selected multiple projects or multiple JIRA filters.
© Select from JIRA Projects	Select from Saved Filters
Filter Name	
Group tasks under a project he A header task will be created in I will be imported and indented in	Microsoft Project and all issues from the project

When using the "Select from Saved Filters" option, you will get a list of the configured filters in JIRA. You can select a single filter or multiple filters.



Exclude subtasks from the import

If this option is chosen, any issue in JIRA that has a type of a sub-task will get excluded from the import. This can be used if you wish to import only the high-level parent tasks into your project plan.

Consolidate subtasks during the import

The consolidate option will also exclude the subtasks from the import, but it will consolidate all of the estimates of the children tasks and roll those up to the parent task.

Indent subtasks during the import

If this option is chosen, subtasks are included in the import and will be imported and indented under their parent task.

Import subtasks on the same level as the part task

Use this option if you wish to import all of the issues in JIRA, including the subtasks, but you don't care about the issues relationship to its parent. This can be useful if a sorting mode is used that does not allow the task to be indented.

NOTE: Even if this option is chosen, the relationship to its parent task in JIRA is preserved and updates still work correctly work.

	JIRA to Microsoft Project Advanced Import
	Specify how to handle the resource assignment during the import process.
G	Import tasks as unassigned
	All tasks will be imported as unassigned.
C	Assign to resource only if the resource exists
	Tasks without corresponding MSProject resources will be imported unassigned.
C	Automatically create a resource if not found
	Missing Resources will be automatically created in Microsoft Project.
	Prompt before automatically creating the resource entry
C	Assign all to selected resource
	Assign all imported tasks to the selected resource. You can enter a new resource into the combo box.
	<u> </u>

Import tasks as unassigned

When this option is chosen, all of the tasks will get imported as unassigned, irregardless of their assignment status in JIRA.

Assign to resource only if the resource exists

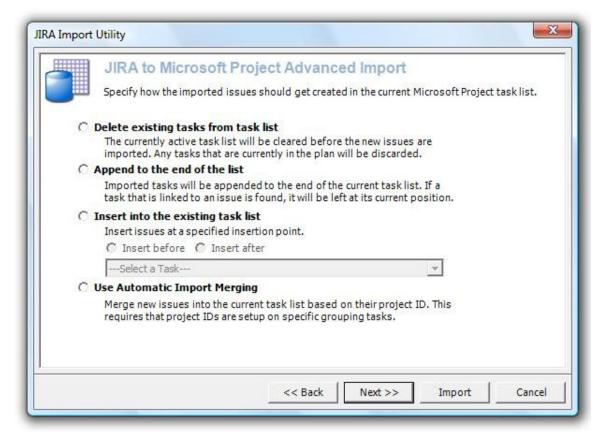
This option will assign the resource only if a matching resource can be found in the current resource sheet of the open project. New resources will not get created and you will not be prompted about any resource that is missing.

Automatically create a resource if not found

If this option is chosen, a resource entry in your current resource sheet will be created for each unique resource and the task will be assigned. If you check the optional "prompt before automatically creating the resource entry", you will get the option to skip the assignment if it is missing.

Assign all to selected resource

This option will allow you to assign all of the imported tasks to the same user. Simply pick the user from the available list of users and after the import completes, all of you tasks will be assigned.



Delete existing tasks from task list

This option will clear the current task list, removing everything that is there, before importing the new issues that will get returned from the filters.

Append to the end of the list

This option will append any new issues to the bottom of the task list. If the issue ID already exists in the current task list, it will get skipped. You can only have a specific issue ID once in your project list.

Insert into the existing task list

The insert mode will allow you to select an insertion point and select "Insert before" or "Insert after" which will control the insertion location of the new tasks.

mport Utility		
JIRA to N	licrosoft Project Advanced Import	
Specify how ye	ou would like the imported issues grouped and so	rted.
Group issues as	they are imported	
	ies will cause all issues of a like type to be groupe issue type, all of the issue types will be imported	
Group By	Do Not Group	T
	🦳 Create a header task for this group	
Sorting Options		
Primary Sort	Do Not Sort	•
	C Ascending C Descending	
Secondary Sort	Do Not Sort	•
	C Ascending C Descending	
	<< Back Next >>	Import Cancel

Group issues as they are imported

You can group the imported issues by a variety of grouping options. Grouping issues will sort by that group so that all of the like grouping issues are together. If you check the "Create a header task for this group" option, the issues will be indented under heading group.

Sorting Options

The sorting options of the import all you to sort the issues with a primary sort and a secondary sort. You can control whether you want the issues sorting ascending or descending.

Issue Types and R		Control which I	ssues will be included during the import p	JIOCESS.
	Unselect All	Select All	Unselect All	Select All
✓ Improvement		*	✓ Incomplete	*
Bug			Cannot Reproduce	
New Feature		*	Fixed	*
	Unselect All	Select All	Unselect All	Select All
Reopened		*	Minor	*
A DECK OF A			Trivial	
Resolved		*	✓ Blocker	*
A DECK OF A				

You can filter the import on the issue type, resolution, status and priority. Simply check the options you wish to have included in the import. You can use the "Unselect All" and "Select All" option for checking all the options available in a specific group.

Filter issues that get imported by the com	and the second
roject ORDSYS	✓ Select All For All Projects
 Customer Management Order Management 	All None ✓ Include unassociated
Affects Version(s) / Fix Version(s)	Include Unassociated <u>All</u> <u>None</u>
	✓ Include Unassociated All None ✓ Version 1.0
	provide a second s

Versions and Components can also be filtered during the import. Simply select which versions and components you wish to have included in the import. The "Include Unassociated" checkbox will determine if any issue that is not associated with a version or component is included.

You can use the "All" and "None" checkboxes to check all or clear all the selection.

RA Import	Utility
	JIRA to Microsoft Project Advanced Import
	Specify advanced import options.
	Resource Assignment Filtering
	Import both assigned and unassigned issues
	C Import only assigned issues
	C Import only unassigned issues
	🗌 If task already exists, refresh all JIRA data
	This option will cause the import process to update any tasks that already exist in the project plan to synchronize with JIRA. If you have made changes to Microsoft Project tasks, this option will overwrite your changes.
	<< Back Next >> Import Cancel

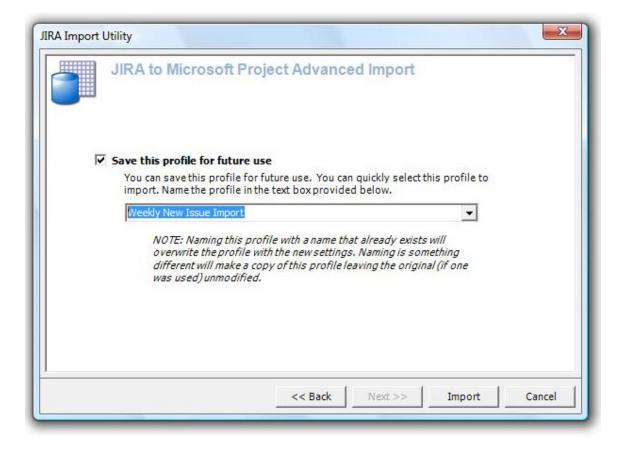
Resource Assignment Filtering

You can use the resource assignment filter to control which type of issues are included. If you chose to only include the unassigned issues, than any issue that has an assignment will be excluded from the import.

If task already exists, refresh all JIRA data

If this option is checked, The Connector will scan the current project sheet for existing tasks and if it finds a match, the import will update that task with the current values from JIRA.

CAUTION: If this option is checked and changes have been made in Microsoft Project, your data will be overwritten.



Save this profile for future use

If you wish to save this profile for future use, simply check the save checkbox and name the profile. You can name this profile anything you wish. Once saved, it will show up in the first screen of the import wizard as an available import profile.

Browse JIRA Issues

The Browse JIRA Issues dialog allows you to scroll through all the issues under a specified project. You can change the project by typing a new project ID or using the Browse Projects button. Press the "Refresh" button to update the list.

Issue Type Include All Issue Types Issue Status Include All Statuses Issue Priority Include All Priorities IIRA ID Description ORDSYS-102 Another subtask ORDSYS-101 New subtask ORDSYS-101 New subtask ORDSYS-99 Another sub task ORDSYS-99 Another sub task ORDSYS-98 Sub task test ORDSYS-98 Sub task test ORDSYS-96 Create Edit Customer Screen ORDSYS-95 Create Add New Customer Screen ORDSYS-94 Subtask ORDSYS-93 Here is a new task	69 issues foun	d.		Res	et Columns	Refresh
Issue Status Include All Statuses Issue Priority Include All Priorities JIRA ID Description Image: Status Image: Status <th>JIRA Project</th> <th>ORDSYS</th> <th>Browse Projects</th> <th></th> <th></th> <th></th>	JIRA Project	ORDSYS	Browse Projects			
JIRA ID Description ORDSYS-102 Another subtask ORDSYS-101 New subtask ORDSYS-100 Test the task ORDSYS-99 Another sub task ORDSYS-98 Sub task test ORDSYS-97 This is a sub task. ORDSYS-96 Create Edit Customer Screen ORDSYS-95 Create Add New Customer Screen ORDSYS-94 Subtask ORDSYS-95 Here is a new task	Issue Type	Include All Issue Types	•			
ORDSYS-102 Another subtask ORDSYS-101 New subtask ORDSYS-100 Test the task ORDSYS-99 Another sub task ORDSYS-98 Sub task test ORDSYS-97 This is a sub task. ORDSYS-96 Create Edit Customer Screen ORDSYS-95 Create Add New Customer Screen ORDSYS-94 Subtask ORDSYS-93 Here is a new task	Issue Status	Include All Statuses	•	Issue Priority	Include All Prior	ities 💌
ORDSYS-101 New subtask ORDSYS-100 Test the task ORDSYS-99 Another sub task ORDSYS-98 Sub task test ORDSYS-97 This is a sub task. ORDSYS-96 Create Edit Customer Screen ORDSYS-95 Create Add New Customer Screen ORDSYS-94 Subtask ORDSYS-95 Here is a new task	JIRA ID	Description				
ORDSYS-100 Test the task ORDSYS-99 Another sub task ORDSYS-98 Sub task test ORDSYS-97 This is a sub task. ORDSYS-96 Create Edit Customer Screen ORDSYS-95 Create Add New Customer Screen ORDSYS-94 Subtask ORDSYS-95 Here is a new task	ORDSYS-102	Another subtask				
ORDSYS-99 Another sub task ORDSYS-98 Sub task test ORDSYS-97 This is a sub task. ORDSYS-96 Create Edit Customer Screen ORDSYS-95 Create Add New Customer Screen ORDSYS-94 Subtask ORDSYS-95 Create Add New Customer Screen ORDSYS-94 Subtask ORDSYS-93 Here is a new task	ORDSYS-101	New subtask				
ORDSYS-98 Sub task test ORDSYS-97 This is a sub task. ORDSYS-96 Create Edit Customer Screen ORDSYS-95 Create Add New Customer Screen ORDSYS-94 Subtask ORDSYS-93 Here is a new task	ORDSYS-100	Test the task				
ORDSYS-97 This is a sub task. ORDSYS-96 Create Edit Customer Screen ORDSYS-95 Create Add New Customer Screen ORDSYS-94 Subtask ORDSYS-93 Here is a new task	ORDSYS-99	Another sub task				
ORDSYS-96 Create Edit Customer Screen ORDSYS-95 Create Add New Customer Screen ORDSYS-94 Subtask ORDSYS-93 Here is a new task	ORDSYS-98	Sub task test				
ORDSYS-95 Create Add New Customer Screen ORDSYS-94 Subtask ORDSYS-93 Here is a new task	ORDSYS-97	This is a sub task.				
ORDSYS-94 Subtask	ORDSYS-96	Create Edit Custom	er Screen			
ORDSYS-93 Here is a new task	ORDSYS-95	Create Add New Cu	stomer Screen			
	ORDSYS-94	Subtask				
	ORDSYS-93	Here is a new task				
PIORDSYS-87 123123123	ORDSYS-87	123123123				=
	ORDSYS-86	The full description				

You can use the filter options on this dialog to restrict which issues are showing based on the issue type, status and priority.

Working with Custom Fields

The Connector can exchange custom field data with JIRA.

Using Custom Fields

The Connector allows for limited exchanging of custom field data between JIRA and Microsoft Project. To use this function, you will need to enable the option under the configuration screen.

Connectivity Settings Options Mappings	s JIRA Defaults Sync Settings About
ne Connector Settings	
Remember Last Login	
Populate Microsoft Project Task Hyperli	nk field with the JIRA issue link
Cache the project list in memory for fast	ter project browsing
Use JIRA Components and Versions	🔲 Use JIRA Environment Field
Use JIRA Slave Project/Issue	✓ Use JIRA Custom Fields

For demonstration purposes, we've created some custom fields in JIRA. Once for a Customer Tracking Number, which we will store some arbitrary value that ties to a customer and a Ready To Update flag which indicates that the fix is ready to be deployed.

Name	Туре	Available Context(s)	Screens	Operations
Additional Comments Here are some additional comments.	Free Text Field (unlimited text)	Issue o type(s):	Default Screen Resolve Issue Screen Workflow Screen	Configure Edit Screens Delete
Customer Email Customer's Email Address	Text Field (< 255 characters)	Global (all issues)	Default Screen Resolve Issue Screen Workflow Screen	Configure Edit Screens Delete
Customer Tracking Number Customer Tracking Number	Text Field (< 255 characters)	Global (all issues)	Default Screen	Configure Edit Screens Delete
Ready to Update Ready To Update	Select List	Global (all issues)	Default Screen	Configure Edit Screens Delete
Start Date Provide the start date that the developer should begin work on this issue.	Date Picker	Global (all issues)	Default Screen Resolve Issue Screen Workflow Screen	Configure Edit Screens Delete

The Setup Wizard of The Connector now has a "Customize" button where all of your field mappings are located. This is because with custom fields, there is now a variable amount of values that can be mapped.

NOTE: Microsoft Project has 30 custom text fields that The Connector uses, but you can mix and match the values you wish to use.

Setup Wizard
Setup Wizard Before you can use The Connector with this project file, you must configure some informaton. Please configure the information below to continue.
JIRA Project Setup
Default JIRA Project (Optional)
Browse Projects
The optional project specified here will be the default project that gets used for creating new issues.
Customize the locations used to store JIRA information. If this information is not altered, the default values configured will be used.
Customize
OK Cancel

There are 5 mappings that are required but all of the others can be assigned as you wish.

Field Mappings			X
Basic Mapping Custom Fields	i]		
Specify the storage location optional.	is of JIRA information. Som	e of the values are requ	ired, others are
Reset to Defaults	Default All		
Required JIRA Mappings			<u>^</u>
Issue ID (Required)		Text1	• =
Project ID (Required)		Text2	- L
Issue Type (Required)		Text3	•
Issue Priority (Required)		Text4	•
Issue Status (Required)		Text5	•
Optional JIRA Mappings			
		ОК	Cancel

Copyright 2007-2008 Ecliptic Technologies, Inc. – ALL RIGHTS RESERVED The Connector 1.2 User Manual – Revision A The "Custom Fields" tab of this dialog will allow you to assign the location for the custom fields you wish to exchange.

Field Mappings	X
Basic Mapping Custom Fields Custom fields can be mapped to various Microsoft Pr mappings below.	oject custom fields. Specify those
Auto Assign to First Available	
🔲 Ready to Update	_
Customer Tracking Number	_
🗖 Start Date	_
Customer Email	
Additional Comments	_
	OK Cancel

Simply check the fields you wish to exchange and assign a Text field from the drop down selection box.

ield Mappings	X
Basic Mapping Custom Fields	
Custom fields can be mapped to various Microsoft mappings below.	Project custom fields. Specify those
Auto Assign to First Available	
✓ Ready to Update	Text24 💌
Customer Tracking Number	Text25
☑ Start Date	Text22 💌
🗖 Customer Email	_
Additional Comments	Text19 💌
	OK Cancel

Once these values are configured, you can click on the header and choose the "Insert Column" function to add these custom fields to your task list in Microsoft Project.

Column Defi	nition
Field <u>n</u> ame:	Task Calendar 🗸 🗸
<u>T</u> itle:	Text16 (Slave Issue ID) Text17 (Additional Comments)
Align title:	Text18 (Customer Email)
Align data:	Text19 (Start Date)
<u>W</u> idth:	Text20 (Customer Tracking Number) Text21 (Ready to Update)
	Text22 Best Fit OK Cancel

You'll notice that our task list in Microsoft Project has two columns for our custom fields.

6)	Task Name	Customer Tracking Number	Ready to Update	Duration
---	---	-----------	--------------------------	-----------------	----------

Next, we'll create a task in Microsoft Project and highlight it.

S	end To	JIRA	Update From	n JIRA Sync All	Tools • Project Info Im	port Configure JIRA L	ogout ෫
			I				1
		0	Task Name		Customer Tracking Number	Ready to Update	Duration
	1		A Testing	JIRA Issue			1 day?

These values can be edited right inline or through the Issue Editor. By selecting the task and choosing the "Issue Editor" option under the tools menu, we can display the issue editor dialog.

F : Com
logout 📮
Duration
1 day?
· · · · · · · ·

The issue editor has been enhanced in The Connector 1.2 to support some additional functionality. You'll notice the new tab for custom fields.

ssue ID: To Be Created Project ID:	Browse Projects 🧳 Lin	nk 🛛 🗌 JIRA Ignored
Summary A Testing JIRA Issue		- 1
<< Previous Next >> << Previous	Selected Next Selected >>	Send To JIRA
View JIRA Issue ercentage Complete: 0% Click to Analyze		Update Group
Here are some additional comments.		T T
Customer Email Customer's Email Address		

We can make the changes to the custom field from this dialog.

NOTE: The Connector cannot determine the type of custom field from JIRA, so you will have to make sure that value is formatted correctly. In the case of the "Ready To Update" custom field, it is a selection field with valid values Yes and No.

Summary A Testing JIRA Issue	Browse Projects 🥑 l	ink 🛛 🗆 JIRA Ignored
<< Previous Next >> << Previous Se	elected Next Selected >>	Send To JIRA
View JIRA Issue Percentage Complete: 0% Click to Analyze		Update From JIRA Update Group
Additional Comments Here are some additional comments.	This issue has a high priority to the or inform the customer when this issue i	
		=
Customer Email Customer's Email Address	joe.customer@company.com	*
	joe.customer@company.com 9/24/2008	· · ·

Next we'll send this data to JIRA using the "Send To JIRA" function. You will need to make sure via the "Customize" option of the Send To JIRA function that you have checked to include your custom fields. Without have these option checked, The Connector will skip over custom field's values.

Customize Send To JIRA
Customize what data is exchanged with JIRA using the options below. The selected information will be sent to JIRA and used for updating the JIRA issue.
Select All Unselect All
Standard Fields Custom Fields
✓ Include Additional Comments
☑ Include Customer Email
✓ Include Customer Tracking Number
✓ Include Ready to Update
✓ Include Start Date
NOTE: Certain values such as issue type, status, priority, summary and reporter are required for creating new issues. These values will be used irregardless of these settings for creating issues.
Use these settings for only this update OK Cancel

Once the information is sent to JIRA, you'll notice that the values we have provided are displayed under the issue.

Original Estimate:	1 day	Remaining Estimate:	Unknown	Time Spent:	Unknown
Additional Comments:	This issue ha	as a high priority to the customer. I	Please inform the custo	mer when this issue is	resolved.
Start Date:	09/24/2008				
Customer Email:	joe.customer	@company.com			
All Comments Wor	k Log Change H	listory			Sort Order: 🖏
There are no comments ye	et on this issue.				

If we edit the issue through JIRA and alter one of the values, we can do an Update From JIRA and pull this information back into Microsoft Project. In this case, we have changed the Ready To Update flag to No.

Ready to Update:	None								
	Ready	To Update							
Customer Tracking	X980	4399							
Number:	Custon	ner Tracking	Number						
Additional Comments:	This i resol		a high p	priority to the cu	istomer. Please	inform the (customer when thi	s issue is	*
	Here a	re some add	itional co	omments.					
Start Date:	24/Se	•]					
	Provid	e the start da	te that tr	te developer sho	uld begin work on t	nis issue.			
Customer Email:	-	ustomer@d		iy.com					
	Custon	ner's Email A	ddress						
Original Estimate:		1 day	Remai	ning Estimate:		1 day	Time Spent:	Unknown	
Customer Tracking Number:	X9804	399							
Additional Comments:	This is	sue has a h	nigh prio	rity to the custo	mer. Please inforn	n the custom	er when this issue	is resolved.	
Start Date:	09/24/	2008							

We'll add a customer tracking to through JIRA to this issue. Once we do the "Update From JIRA" function, we'll notice that value imported into your Microsoft Project file.

joe.customer@company.com

Customer Email:

5	Send To	o JIRA	Update From JIRA Sync Al	II Tools 🕶 Project Info Im	port Configure JIRA	Logout ෫
		0	Task Name	Customer Tracking Number	Ready to Update	Duration
	1		A Testing JIRA Issue	X9804399		1 day

Working with Sub Tasks

The Connector supports the import and creation of JIRA sub-tasks through Microsoft Project. In Microsoft Project, a sub-task is a task that is indented under its parent.

NOTE: The indention level in Microsoft Project is not a requirement for a JIRA subtask. You can have an indented task in Microsoft Project that is not a sub-task and you can have a JIRA sub-task in Microsoft Project that is not indented. This is entirely dependent on your requirements and how you are using The Connector.

We've initialized the project sheet and create a single parent task to create in JIRA.

🗐 Ei	e <u>E</u> o	lit <u>V</u> iew	Insert	F <u>o</u> rmat	<u>T</u> ools	<u>P</u> roject	<u>R</u> eport	<u>C</u> ollabor	ate	<u>W</u> indow	JIRA	<u>H</u> elp	Type a ques
	7 📕	🛱 🙆 🖣	a 🛍	17 - (*	- 😣	@ 💥	🖹 🕵	0		1	🔿 A	rial	
() ()		🖻 🚮 🤇	🕽 Favo	orites • G	o • 🛛 🐺	Project	3						
Send T	o JIRA	Update From	m JIRA	Sync All	Tools •	Project 1	info Impo	ort Config	jure J	IRA Logou	it 🖕		
Send T	o JIRA	Update Fro	_	Sync All ent Task	Tools •	Project I	info Impo	ort Config	jure J	IRA Logou	it _∓		
Send T	o JIRA	Update From	A Pare	ent Task	Tools •		info Impo A Issue Ty		jure J	IRA Logou Start		Finish	Predecessors
Send T	1		A Pare ID Tas	ent Task				pe Dur				Finish on 9/15/08	

Highlight the task and select the "Send To JIRA" option. This will create an issue in JIRA. After this is completed, you will see the issue ID in the Microsoft Project task.

		oject - Project3	rt F <u>o</u> rmat <u>T</u> ool	s Project	Report	Collaborate	Window IIR	A Help	Type a ques
1000									Type a que.
: 🗋 🗁		🛱 🚨 l 🗈 🕻	<u>∎</u> ¶ - (° - (§	s 🔋 🕺	E 🛃	0	🚆 🌳	Arial	
90		🖻 🛛 🟠 F	avorites • <u>G</u> o •	Project	3				
Send T	o JIRA	Update From JI	RA Sync All Tool	s 🕶 🛛 Project	Info Import	t Configure	JIRA Logout 💂	;	
		OR	DSYS-173						
	0	JIRA Issue ID	Task Name	JIF	RA Issue Typ	e Duration	Start	Finish	Predecessors
1	٩.	ORDSYS-173	A Parent Task		Ta	ask 1 day?	Mon 9/15/08	Mon 9/15/08	

Checking in JIRA, you will see the newly created issue.

Simple Order Managen		39 PM			
Component/s:	None				
Affects Version/s:	None				
Fix Version/s:	None				
Original Estimate:	1 day	Remaining Estimate:	Unknown	Time Spent:	Unknown
All Comments V There are no comments	Vork Log Chang				Sort Order: 🖏

We'll create a task right below the parent task and fill in the description of the task.

	osoft Pr	oject - Project3								
🖻 Ei	le <u>E</u> di	t <u>V</u> iew <u>I</u> nse	ert F <u>o</u> rmat	<u>T</u> ools	<u>P</u> roject	<u>R</u> eport	<u>C</u> ollaborate	<u>W</u> indow	JIRA <u>H</u> elp	Type a qu
	j 🖬 🛛	🛱 🚨 📭 🖡	🔁 i 🤊 🗸 (°	- 😣	e 💥	1 🖹 💰	0	1	arial 🔶	
() ()		🖻 🛛 🟠 F	avorites • G	io • 🛛 🐺	Project	3				
Send 1	o JIRA	Update From JI	RA Sync All	Tools •	Project	Info Imp	ort Configure	JIRA Logou	t 🝦	
		Th	is is a sub-task	for the pa	arent task					
	0	JIRA Issue ID	Task Name				JIRA Issue Type	Duration	Start	Finish
	2	ORDSYS-173	A Parent Ta	isk			Task	1 day?	Mon 9/15/08	Mon 9/15/08
1					the neree	ttook		1 day?	Mon 9/15/08	Mon 9/15/08
1 2			This is a su	b-task for	the paren	LIGSK		r duy :	11011 3/13/00	
1			This is a su	b-task for	the paren	LIGSK		r duy.	mon or 1000	

Next we'll highlight the task, right click the task and select the "Indent" option to position the new task under the parent task.

JIRA Issue ID Task Name	JIRA Issue Type	Duration	Start	Finish
ORDSYS-173 A Parent Task	Task	1 day?	Mon 9/15/08	Mon 9/15/08
This is a sub task for the parent task		1 day?	Mon 9/15/08	Mon 9/15/08
Cut Task				
<u>C</u> opy Task				
Paste		S		
Paste Special				
New Task				
Delete Task				
Text Styles				
Task Information		<u> </u>		
Task Notes				
Request Progress Information				
Show Sub <u>t</u> asks				
Hide Subtasks				
Outdent				
Indent				
Hyperlink				
In	dent	dent	dent	dent dent dent de

E N	Aicro:	soft Pro	ject - Pro	oject3								
E	<u> </u>	<u>E</u> dit	<u>V</u> iew	Insert	F <u>o</u> rmat	<u>T</u> ools	<u>P</u> roject	<u>R</u> eport	<u>C</u> ollaborate	<u>W</u> indow	JIRA <u>H</u> elp	Type a qu
) 🗋	b 🔒	19 - (1	- 😣	s 💥	1 🖹 💰	8 @	<u> </u>	🔿 🛛 Arial	
4	6		1 🚮	🔾 Fav	orites • <u>G</u>	o • 🛛 🐺	Project	3				
Se	nd To	JIRA U	pdate Fr	om JIRA	Sync All	Tools -	Project	Info Imp	oort Configure	JIRA Logou	it 🚽	
			9									
		0	JIRA Issu	ue ID Tas	sk Name			3	JIRA Issue Type	Duration	Start	Finish
		0 8			sk Name A Parent T	ask			JIRA Issue Type Task		Start Mon 9/15/08	Finish Mon 9/15/08
					A Parent T		for the pa	rent tas			Mon 9/15/08	
	1				A Parent T		for the pa	rent tas		1 day?	Mon 9/15/08	Mon 9/15/08
	1				A Parent T		for the pa	rent tas		1 day?	Mon 9/15/08	Mon 9/15/08

Before we send this task to JIRA, we'll need to indicate to The Connector that this task is a sub-task. To do this, you will need to use the "Tools -> Issue Editor".

🕞 Micro	osoft Pr	oject - Project	3									
Ei Ei	e <u>E</u> dit	t <u>V</u> iew Ins	sert F <u>o</u> rmat	<u>T</u> ools	<u>P</u> roject	<u>R</u> eport	<u>C</u> ollaborate		<u>W</u> indow	JIRA	<u>H</u> elp	Type a qu
1 🗋 🖆	; 🖬 🛛	🖨 🛕 🖬	🔁 🔊 - C	- 🧕) ee 🛒	1 🖹 🕵	0		<u>ا</u>	🧼 🛛 Ar	ial	
.00		o 🖓 😋	Favorites • G	o • 🛛 📑	Projec	ť3						
Send T	o JIRA	Update From .	JIRA Sync All	Tools •	Project	Info Imp	ort Configure	2	JIRA Logou	ıt _∓		
				l	ink Issue							
	0	JIRA Issue ID	Task Name	I	ssue Edito	r			Duration	Sta	rt	Finish
1		ORDSYS-173	B 🗆 A Parent T	1	ask Brows	ser		k	1 day?	Mon 9	/15/08	Mon 9/15/08
2			This is a	1	Mark Selec	ted JIRA Ig	inored		1 day?	Mon 9	/15/08	Mon 9/15/08
				F	lemove Se	elected Fro	m JIRA	F				
				L L	Jnlink Sele	ected Tasks	5	F				
-				١	/alidate Se	lected Tas	ks	F				

Once you have the Issue Editor open, select the "General" tab. On the bottom of the tab, you will see a checkbox that says "This task is a sub-task in JIRA". Check this option to indicate that this will be a sub-task.

ue Editor			— X
General Issue Information Issue ID: To Be Created	Project II	: ORDSYS 🥑 Link	JIRA Ignored
Summary This is a sub-task for the parent task			
<< Previous Next >> <<	Previous Selected Next	t Selected >>	Send To JIRA
View JIRA Issue			Update From JIRA
Percentage Complete: 0% Click to Ana	lyze		Update Group
Reporter pricolai Due Date 9/14/2008 💌 🔽 Issue has no due date	Issue Type Issue Priority Issue Resolution	Trivial	•
Sub-Task			
This task is a sub-task in JIRA Parent Issue ID: ORDSYS-173	View Parent JIRA Issue Browse JIRA Issues		
			Save Cancel

You'll notice that The Connector will automatically fill in the Parent Issue ID. This is done by using the Indent Level of the project sheet.

Su	ib-Task			
	✓ This task is a sub-ta	sk in JIRA	View Parent	<u>: JIRA Issue</u>
	Parent Issue ID:	ORDSYS-173	1	Browse JIRA Issues

NOTE: It is possible to indicate a different parent task to The Connector and when this task gets created in JIRA, it will be created under the specified parent.

Next we'll press the "Save" button to save what we have changed.

Sub-Task	ask in JIRA View Parent JIRA Issue	
Parent Issue ID:	ORDSYS-173 Browse JIRA Issues	
-		Save Cancel

Finally, we'll use the "Send To JIRA" button to create the sub-task in JIRA.

nd T	o JIRA			Configure JIRA	Logout 💂			
		OF	RDSYS-178					
	0	JIRA Issue ID	Task Name	JIRA Issue Type	Duration	Start	Finish	Predeo
1	۵.	ORDSYS-177	A Parent Task	Bug	1 day?	Mon 9/15/08	Mon 9/15/08	
2	٩.	ORDSYS-178	This is a subtask for the Parent Task	Sub-task	1 day?	Mon 9/15/08	Mon 9/15/08	
	1	0 1 4	0 0 JIRA Issue ID 1 0 0 0 0 0 0 0 0 0 0 0 0 0	ORDSYS-178 1 JIRA Issue ID Task Name 1 ORDSYS-177 - A Parent Task	ORDSYS-178 1 JIRA issue ID Task Name JIRA issue Type 1 ORDSYS-177 A Parent Task Bug	ORDSYS-178 1 JIRA Issue ID Task Name JIRA Issue Type Duration 1 ORDSYS-177 A Parent Task Bug 1 day?	Image: State of the state o	ORDSYS-178 1 Image: Start St

After this process, you will see the new issue ID of the created JIRA issue.

Simple Order Managen					
Created: Today 11:39 PM		:39 PM			
Component/s:	None				
Affects Version/s:	None				
Fix Version/s:	None				
Original Estimate:	1 day	Remaining Estimate:	Unknown	Time Spent:	Unknown
Sub-Tasks: All Open	the Parent Task	📓 🐇 Open	Unassigned	Sub-Task Progr Resolve Issu	ess:
New:		Sub-task 🖌 👔	Unassigned 💌	Assign to me	Add
All Comments V There are no comments	<u>Vork Log</u> <u>Chang</u> ; yet on this issue				Sort Order: 🖡

Checking JIRA, you will see the newly created sub-task under the parent task.

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Creating a sub-task in JIRA

Next we'll create a subtask in JIRA and through the update process bring the new issue back into Microsoft Project.

Circula Order Manage	mant Contain					
Simple Order Manage						
Created: Today 11:39 PM		1:39 PM				
Component/s:	None					
Affects Version/s:	None					
Fix Version/s:	None					
Original Estimate:	1 day	Remaining Estimate:	Unknown	Tin	ne Spent:	Unknown
Sub-Tasks: All <u>Oper</u>	1				Sub-Task Progress:	
1. This is a subtask fo	or the Parent Task	D 🛉	Open Unassigned	Ŷ	Resolve Issue	ose Issue
2. A sub task created	through JIRA	D 🗳	Open Unassigned	企	Resolve Issue	ose Issue
New:		Sub-task 🛩	🔋 Unassigned	🖌 Assig	<u>in to me</u>	Add
All Comments	Work Log Chan	ge History				Sort Order:
There are no comment	ts yet on this issu	9.				

Sub-tasks are checked under each "updated" task in Microsoft Project. We only need to highlight the parent task.

<u> </u>	(†	×	🖻 🚮 🔍 Fa	👗 📭 💼 🖋 🖋 🧐 😒 ∞ 💥 💥 vorites ▼ Go ▼ 📑 C:\Documents and Set Sync All Tools ▼ Project Info Import Conf	tings\Pat\My Docum	ents\SubTasks		2 Q 🍞 🛙 🖬
	1	0		Task Name	JIRA Issue Type Bug	Duration 1 day?	Start	Finish F
	2	<u>.</u>	ORDSYS-107	This is a subtask for the Parent Task	Sub-task	1 day?		

Select the parent task and choose the "Update From JIRA" option.

During the update process, The Connector will check any sub-tasks that belong to the parent. Notice that The Connector has detected the new sub-task that was created.

Sub-Tasks Found	x
Sub-Tasks Found This JIRA issue has subtasks that are associated with it that are currently not found in Microsoft Project. Please specify below how to handle the sub-tasks.	
 Import all the subtasks and indent under their parent Import subtasks without indenting 	
 Do not import any of the sub-task information Add sub-task duration to parent 	
Apply this setting to all tasks during the current process	
ОК Са	ncel

You will be prompted with a dialog on how you wish to handle the new task. The default is to import and indent it under the parent task, but you can choose from any of the other options.

: (() ()	×	🖻 🚮 🔇 Fa	vorites • <u>G</u> o • 📑 C:\Documents and Set	tings\Pat\My Docum	ents\SubTasks	.mpp 🚽 🚽	
2	Send To	JIRA U	pdate From JIRA	Sync All Tools 🕶 Project Info Import Confi	gure JIRA Logout	-		
			A su	ib task created through JIRA				
		0	JIRA Issue ID	Task Name	JIRA Issue Type	Duration	Start	Finish
	1		ORDSYS-106	🖃 A Parent Task	Bug	1 day?	Tue 04/22/08	Tue 04/22/08
	2		ORDSYS-108	A sub task created through JIRA	Sub-task	0 days	Tue 04/22/08	Tue 04/22/08
	3	۰	ORDSYS-107	This is a subtask for the Parent Task	Sub-task	1 day?	Tue 04/22/08	Tue 04/22/08
			1					

After this process, you'll notice that the new task that was found was imported and added to the current project sheet.

Updating Sub Task Durations

JIRA does not have any ties between the duration of the sub-tasks and the duration of the parent task, however, Microsoft Project does have a direct tie. In Microsoft Project, the duration of the parent task is the total time span necessary to complete the task.

NOTE: To get the parent task to update, you will need to make sure and highlight that task when doing the "Send To JIRA" function.

Let's set the duration of our tasks.

-				vorites • <u>G</u> o • 🐺 C:\Documents and Sett Sync All Tools • Project Info Import Confi		-	.mpp 💌 🛫								
			A Pa	arent Task											
		0	JIRA Issue ID	Task Name	JIRA Issue Type	Duration	Start	Finish	Predecess	F	pr 20, M T		FS	Apr 27	
	1		ORDSYS-106	🖃 A Parent Task	Bug	5 days	Tue 04/22/08	Mon 04/28/08			-	-			,
	2		ORDSYS-108	A sub task created through JIRA	Sub-task	2 days	Tue 04/22/08	Wed 04/23/08				¢			
	3		ORDSYS-107	This is a subtask for the Parent Task	Sub-task	3 days	Thu 04/24/08	Mon 04/28/08	2			Ĭ			

In Microsoft Project, we've linked the two sub-tasks together as a dependency. This causes the duration of the parent task to be the sum of the two child tasks, in this case 5 days.

Next, we'll highlight the entire group and press the "Send To JIRA" button.

(00		🖻 🚮 😋 Fa	avorites 🕶 🛛 💁 🗤 🖓 👘 C:\Documents and Sett	ings\Pat\My Docum	ents\SubTasks	.mpp 💽 🚽											
ļs	iend To	JIRA U	odate From JIRA	Sync All Tools 🕶 Project Info Import Confi	gure JIRA Logout	-												
		0	JIRA Issue ID	Task Name	JIRA Issue Type	Duration	Start	Finish	Predecess			Apr 1					pr 27, '	
										F	S	SM	T	W T	F	SS	MT	V
	1		ORDSYS-106	🖃 A Parent Task	Bug	5 days	Tue 04/22/08	Mon 04/28/08				1	-				-	
	2	۰	ORDSYS-108	A sub task created through JIRA	Sub-task	2 days	Tue 04/22/08	Wed 04/23/08						h				
	3	۵.	ORDSYS-107	This is a subtask for the Parent Task	Sub-task	3 days	Thu 04/24/08	Mon 04/28/08	2					Ě			1	

After this function completes, you'll notice that the duration of the parent task is now set to 1 week (5 days).

Simple Order Manager		vstem								
A Parent Task										
Created: Yesterday 11:39 F	M Up	dated: Today 1	2:21 AM							
Component/s:	No	ne								
Affects Version/s:	No	ne								
Fix Version/s:	No	ne								
		-	_							
Original Estimate:		1 week	Remainii	ng Estimate:		Unknown		Tin	ne Spent:	Unknown
Sub-Tasks: All <u>Open</u>								9	Sub-Task Progr	ress:
1. This is a subtask for	the Pa	arent Task		📄 👍 Open	Un	assigned		Ŷ	Resolve Issu	e Close Issue
2. A sub task created th	nrough	IJIRA		🗟 🤞 Open	Un	assigned	Ŷ		Resolve Issue	e Close Issue
New:			Sul	o-task 🔽 😰	U	nassigned	~ <u>e</u>	<u>Ussig</u>	n to me	Add
			Sul	o-task 🖌 🍞	U	nassigned	∨ <u></u>	<u>lssig</u>	<u>n to me</u>	Add
New:	Nork I	.og <u>Change</u>		o-task 🖌 👔	U	nassigned	¥ £	<u>lesig</u>	<u>n to me</u>	Add Sort Order

As we drill into the sub-tasks, you'll notice they too have been updated with the values from Microsoft Project.

<u>Simple Order Management System</u> <u>A Parent Task (ORDSYS-106)</u> This is a subtask for the Parent Task										
Created: Yesterday 11:47 PM Updated: Today 12:21 AM										
Component/s: None										
Affects Version/s:	ects Version/s: None									
Fix Version/s: None										
Original Estimate:	3 days	Remaining Estimate:	Unknown	Time Spent:	Unknown					

All Comments Work Log Change History

There are no comments yet on this issue.

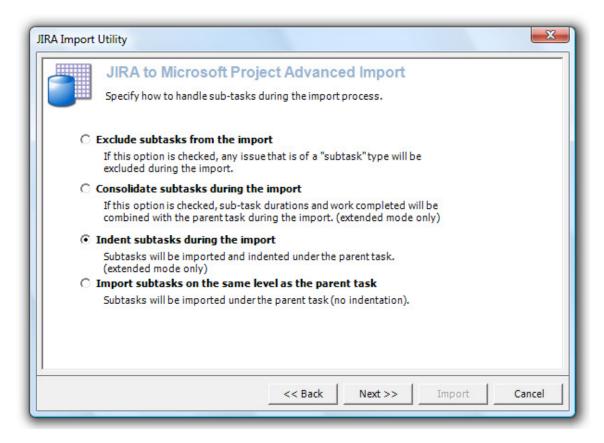
Simple Order Management System A Parent Task (ORDSYS-106)										
Sector Se										
mponent/s:	None									
ffects Version/s: None										
Fix Version/s: None										
ginal Estimato:	2 dovo	Pomaining Estimator	Linknown	Time Sport	Unknown					
ginal Estimate:	2 days	Remaining Estimate:	Unknown	Time Spent:						

All	Comments	<u>Work Log</u>	Change History	Sort Order: 🖡		
There are no comments yet on this issue.						

Sort Order: 🖡

Importing Sub Tasks

The Connector's import functionality allows you to specify how you wish to handle sub-tasks.



If you choose to indent sub-tasks during the import, they will get included and indented under their parent issue in Microsoft Project.

Summary

Helpful Links

- The Connector <u>http://www.the-connector.com</u>
- Ecliptic Technologies, Inc. <u>http://www.ecliptictech.com</u>
- Atlassian <u>http://www.atlassian.com</u>
- JIRA http://www.atlassian.com/software/jira/
- JIRA Plug-ins <u>http://confluence.atlassian.com/display/JIRAEXT/Home</u>
- Microsoft Project <u>http://office.microsoft.com/project</u>