

The Connector

Version 1.3

Microsoft Project to Atlassian JIRA Connectivity

User Manual

**Ecliptic Technologies, Inc.
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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 www.the-connector.com website.*

Installation

Plug-in Installation

To install the plug-in, run the Trial Version installer available on the www.the-connector.com 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 you 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.

Logical Commitment	Never
Use gzip compression	OFF
Accept remote API calls	ON
User email visibility	Public
Comment visibility	Project Roles only

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

Installed Plugins

- [Admin Menu Sections](#)
66 modules.
- [Custom Field Types & Searchers](#)
38 modules.
- [RPC JIRA Plugin](#)
14 modules.
- [Web Resources Plugin](#)
47 modules.
- [Issue Operations Plugin](#)
18 modules.
- [The Connector for Microsoft Project](#)
2 modules.
- [Workflow Plugin](#)
20 modules.

The Connector for Microsoft Project

Description: Microsoft Project to JIRA Integration
Vendor: [Ecliptic Technologies, Inc.](#)
Plugin Version: 1.3
JIRA Versions: 3.6 - 3.13

[Disable plugin](#)

SOAP Services for The Connector (theconnector) SOAP Web Services for The Connector	Disable module
The Connector for Microsoft Project (rpc-theconnector) RPC - Extended web services for enhanced functionality with The Connector for Microsoft Project.	Disable module

Registration

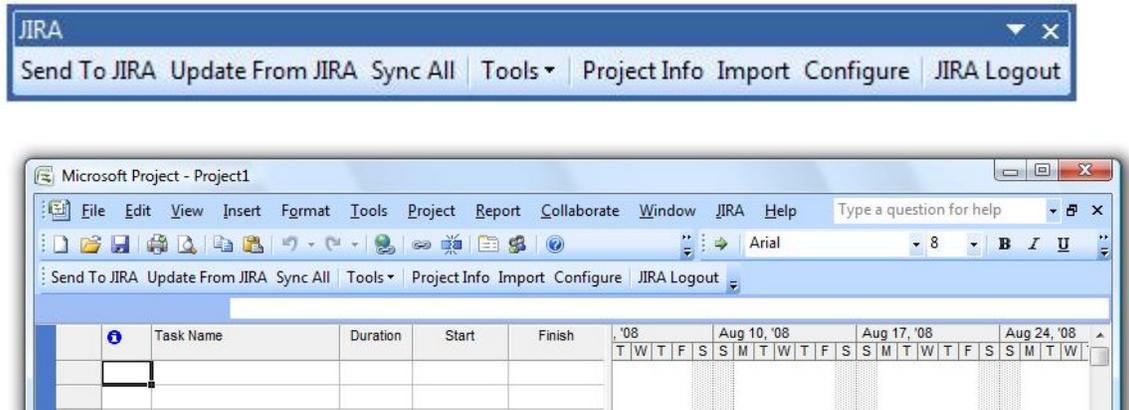
When the trial version is installed, you will get a registration screen before any Connector function. To remove this screen, you need to purchase a copy of the plug-in and enter in the registration key that will be provided after the purchase. Once the registration key has been entered, the trial version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



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.

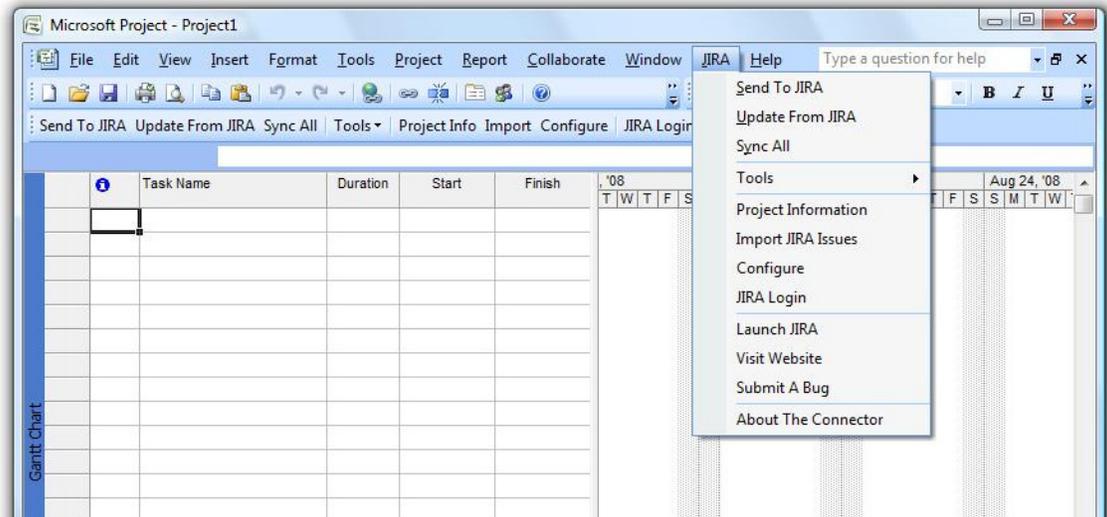
Import – This is a function that allows you to import JIRA issues into the current project plan.

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.



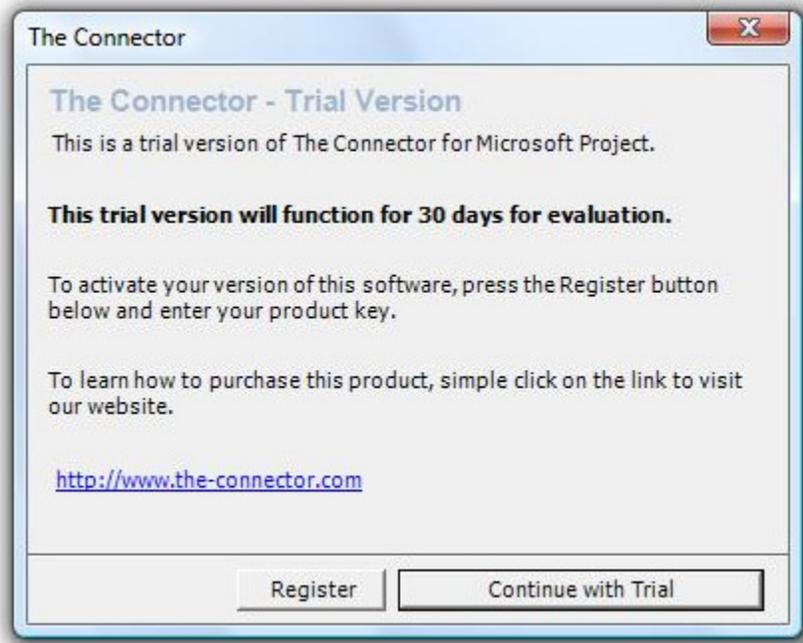
A user can optionally check the "Remember Last Login" option to have the plug-in default the last user name that was used to login to JIRA.

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.

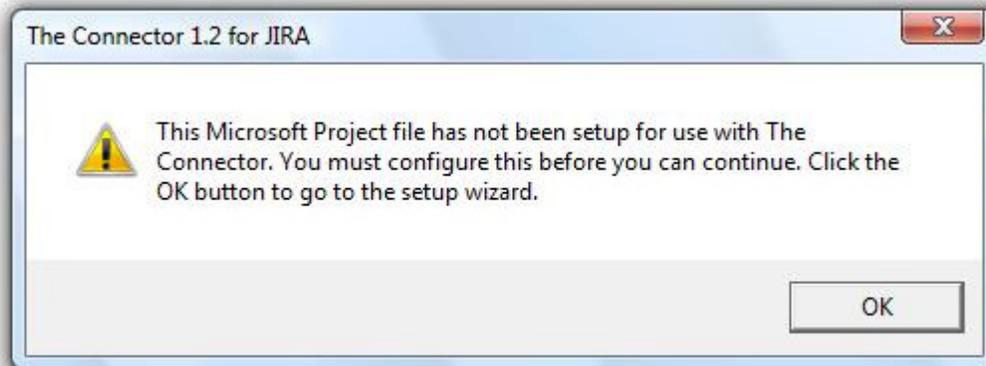


Once you purchase your copy of The Connector, you will receive a product registration key that can be entered into the activation screen. Once activated, the product is fully functional.

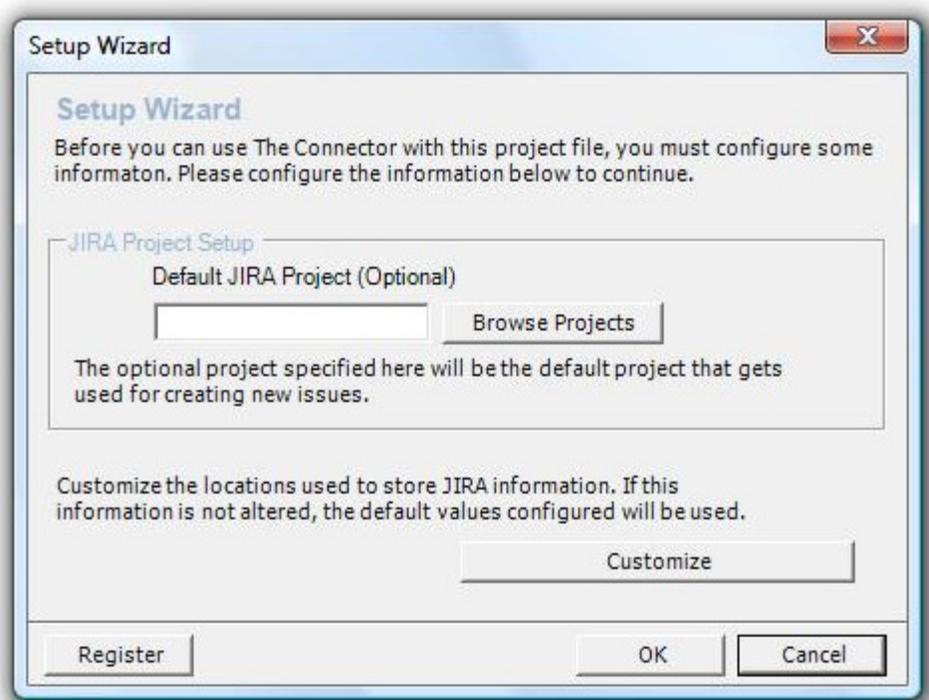


Project Setup

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.



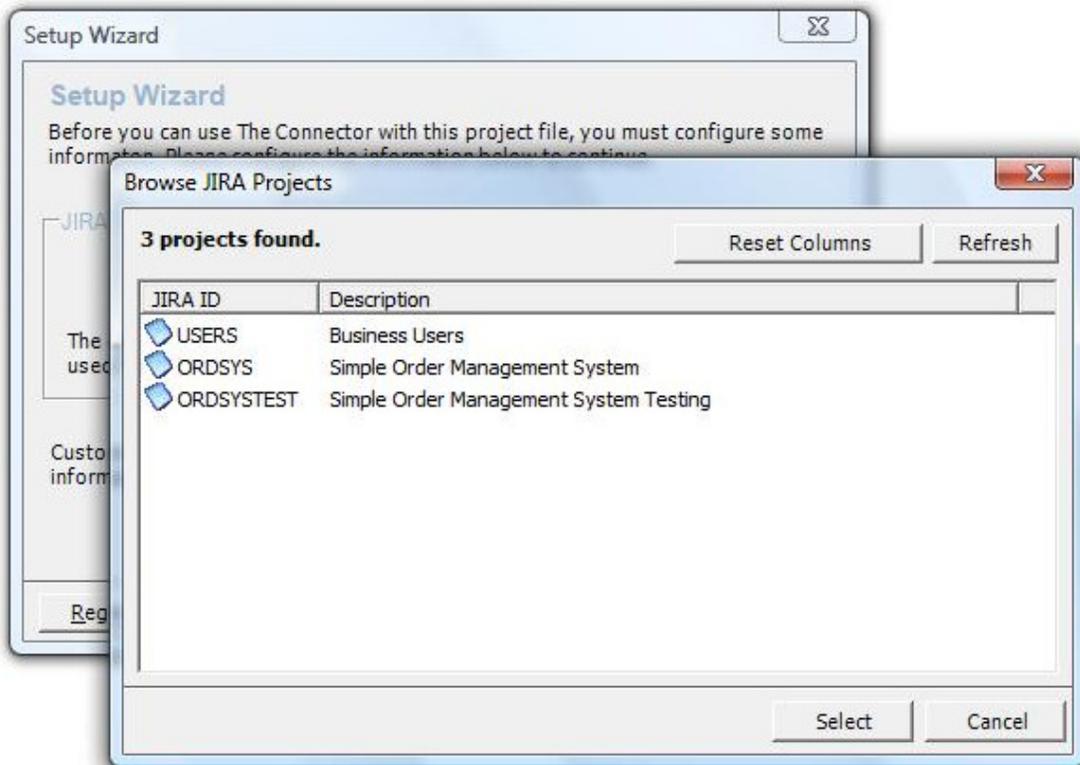
The plug-in will prompt you with the above message indicating that the project file has not been initialized. Click "OK" will take you to the Project Setup Dialog.



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.



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.

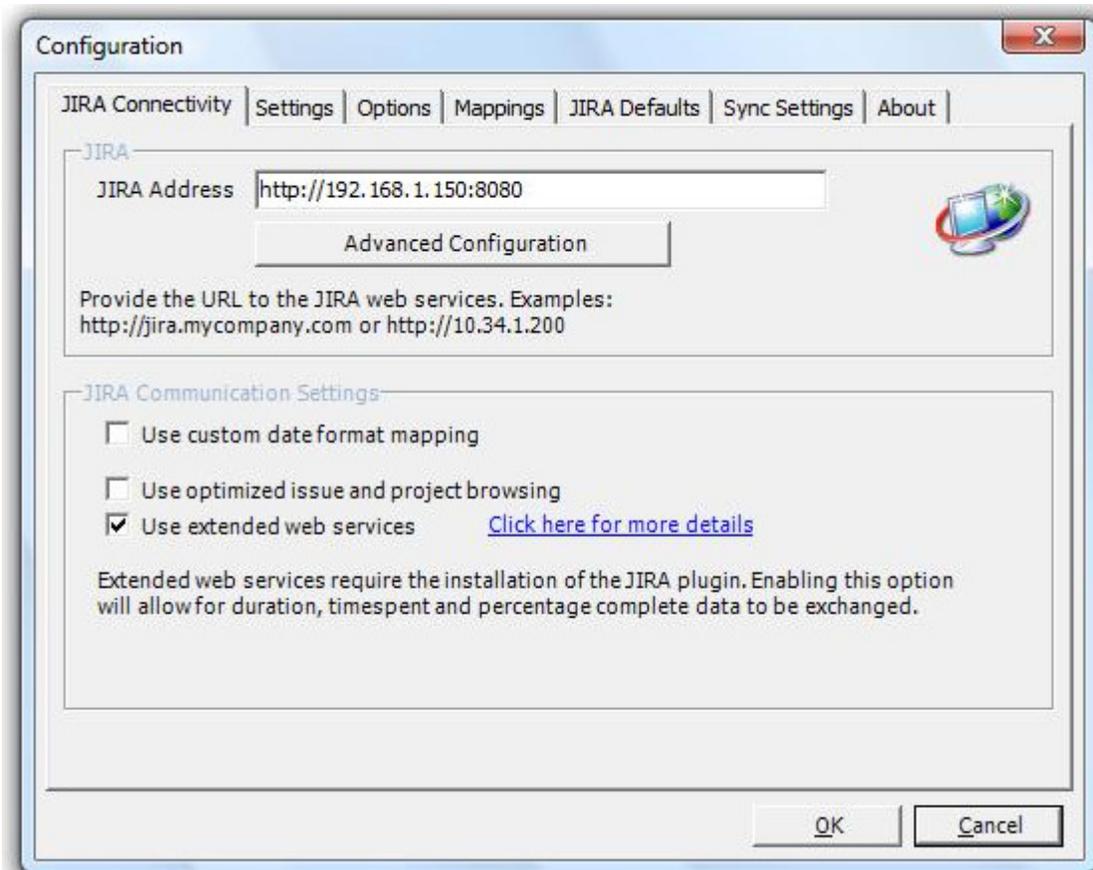
Once these values are provided, press the "OK" button and the project file will be initialized. Once initialized, there is nothing else that is needed to be done and you are able to use The Connector.

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

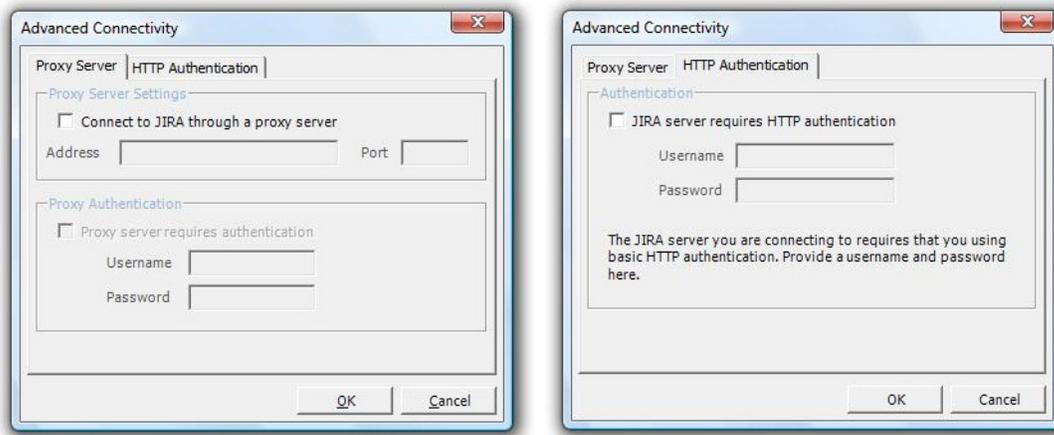
This screen allows configuration of the endpoint to connect to JIRA. It can be an IP address or a domain address, depending on how you have configured your installation of JIRA.



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.

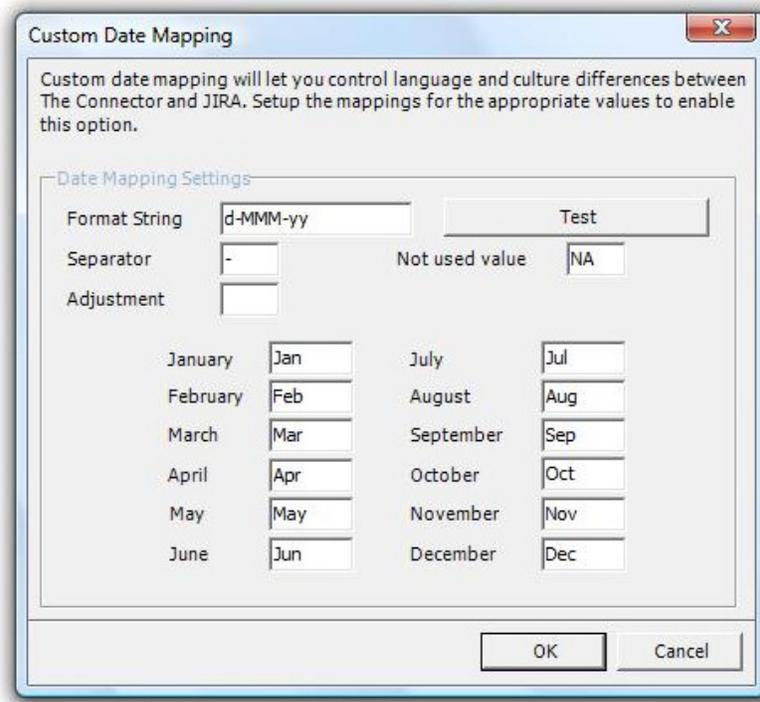


The Proxy Server settings allow you to specify the proxy server and port and then any authentication that your proxy server requires.

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.*



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.

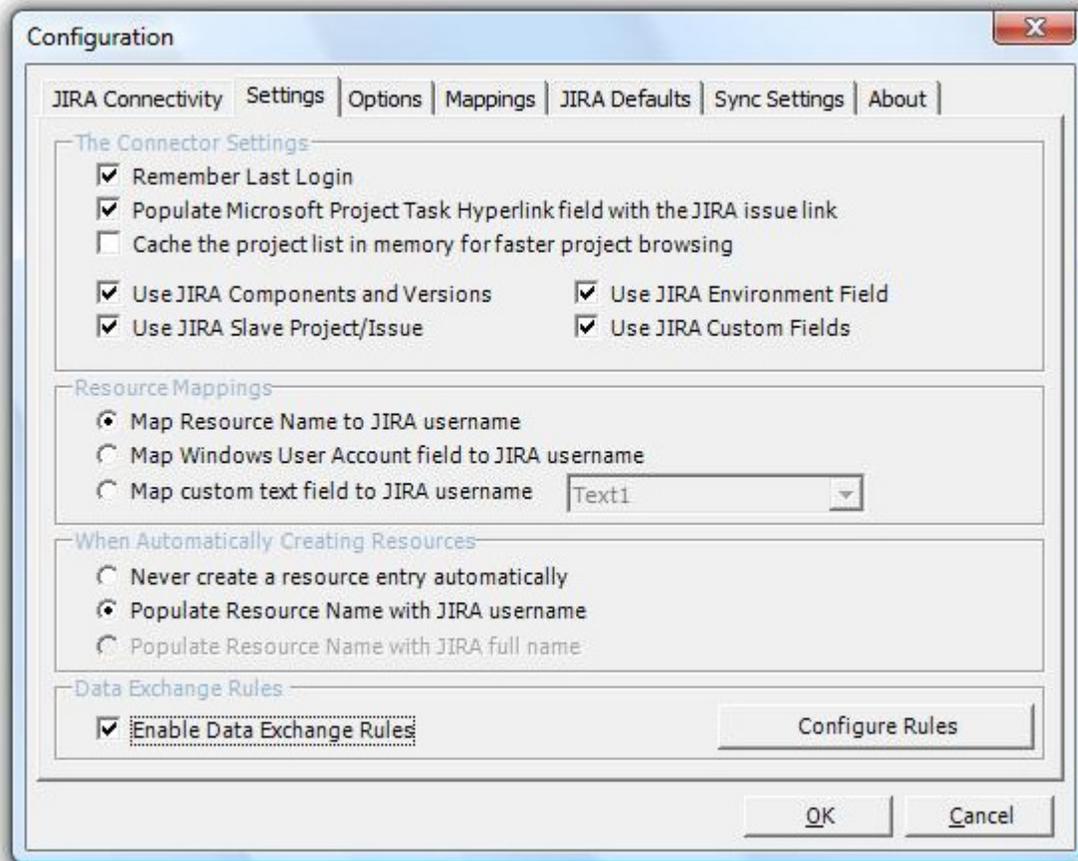
NOTE: This option requires the installation of Ecliptic Technologies extended web services for JIRA. See the section Enabling JIRA Web Services found on page 4 of this manual.

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.



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 your project lists change 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.

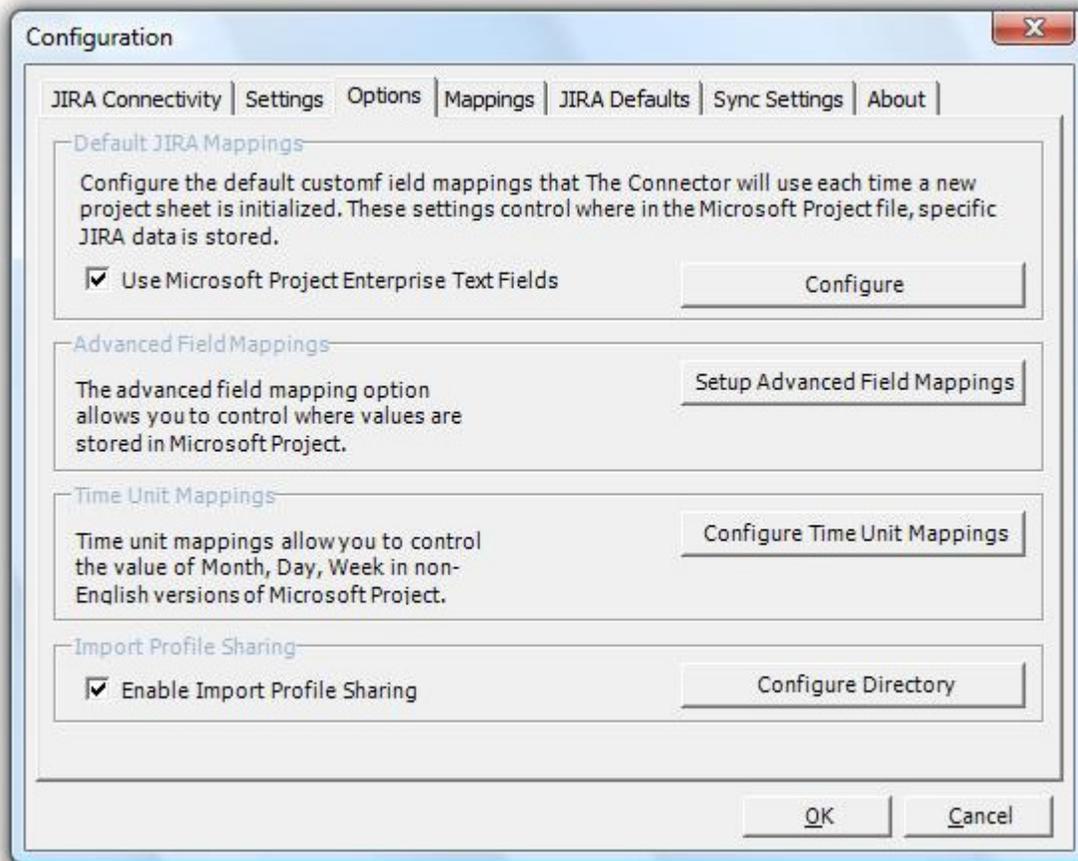
3) Populate Resource Name with JIRA full name

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..



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

Field Mappings

Basic Mapping | Custom Fields

Specify the storage locations of JIRA information. Some of the values are required, others are optional.

Reset to Defaults | Default All

Required JIRA Mappings

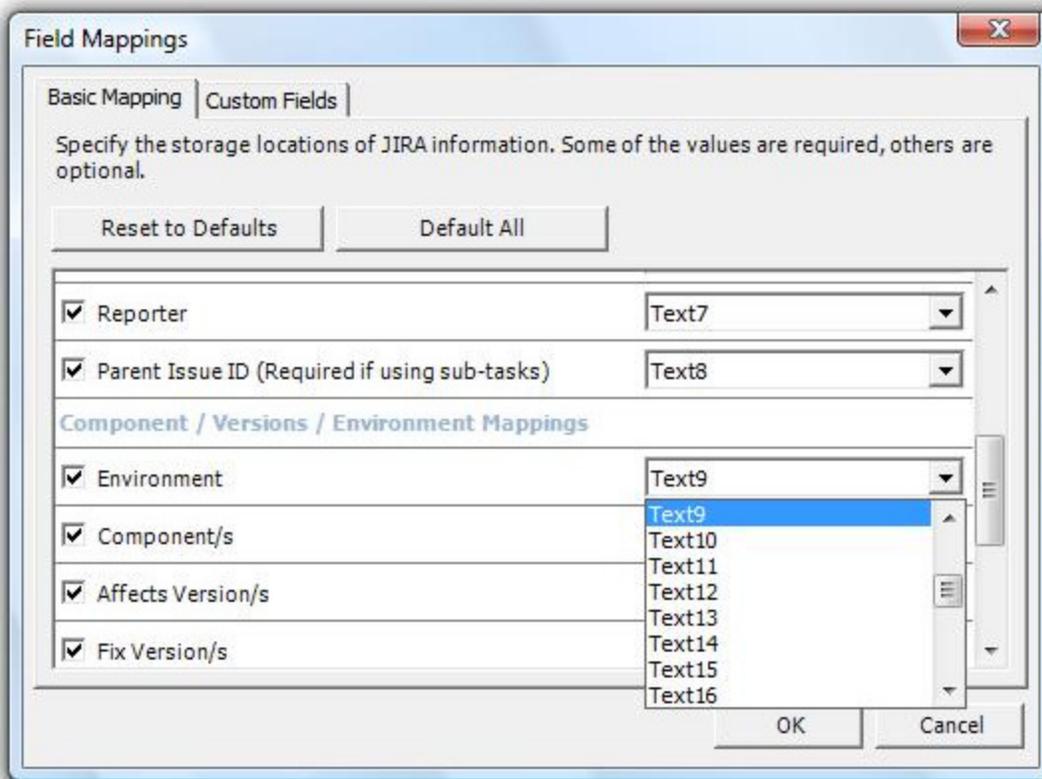
Issue ID (Required)	Text1
Project ID (Required)	Text2
Issue Type (Required)	Text3
Issue Priority (Required)	Text4
Issue Status (Required)	Text5

Optional JIRA Mappings

OK | Cancel

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.



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

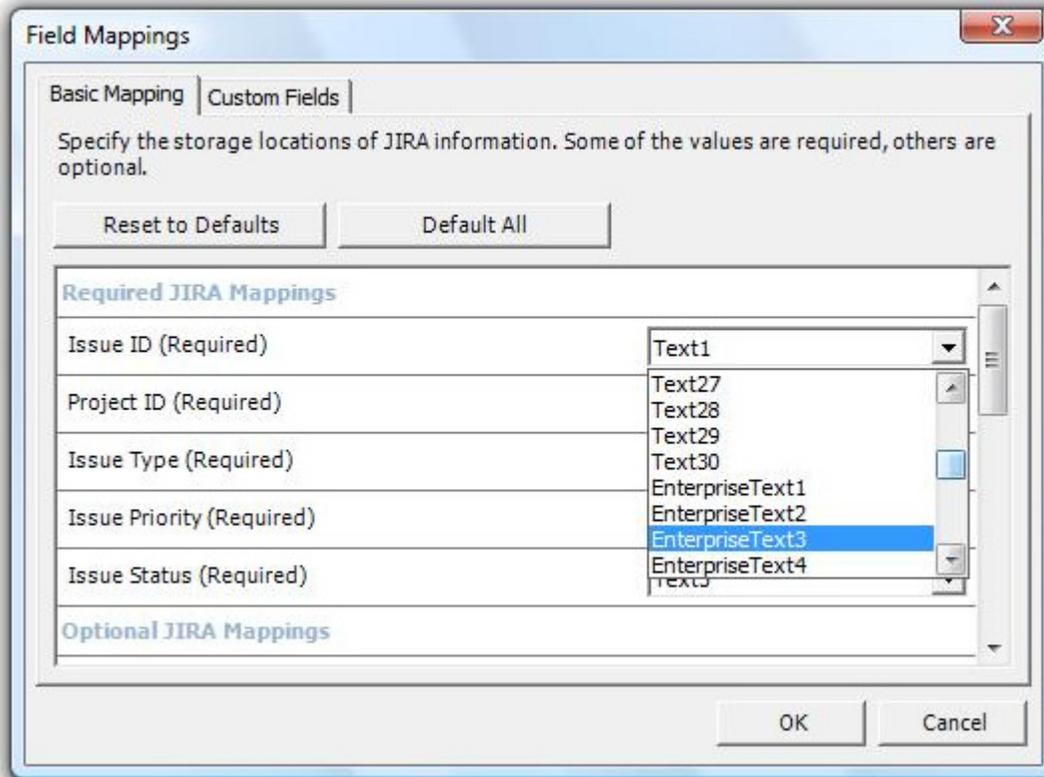
This button will reset your mappings to a default state selecting the first 5 required fields and disabling others.

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.

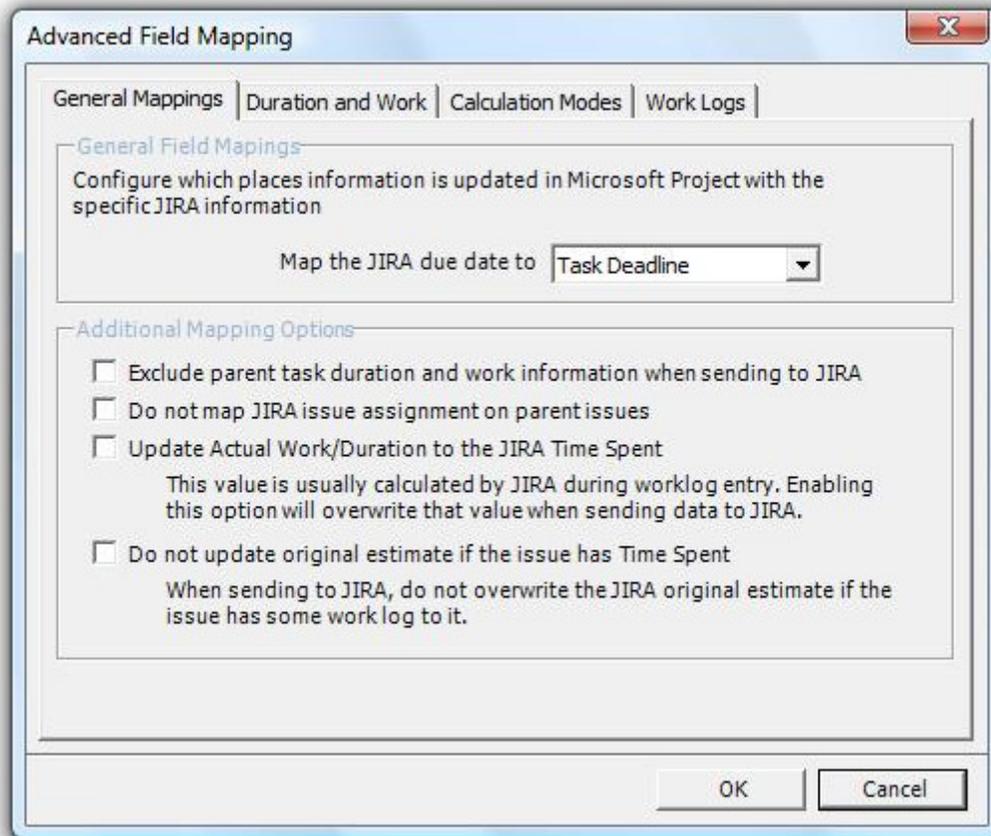


If this option is checked, you will notice options in the drop down list of the mapping for EnterpriseText fields. These correspond to storage locations for Microsoft Project Server.

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.



Exclude parent task duration and work information when sending to JIRA

This option will not update JIRA parent task duration and timespent data. This can be used to prevent The Connector from doubling up duration information in JIRA. Microsoft Project forces the sum of all sub-tasks to be equal to the parent task. JIRA does not have this enforcement. Depending on how you use JIRA, the estimates in JIRA may be in addition to the estimates of the sub tasks.

Do not map JIRA issue assignment on parent issues

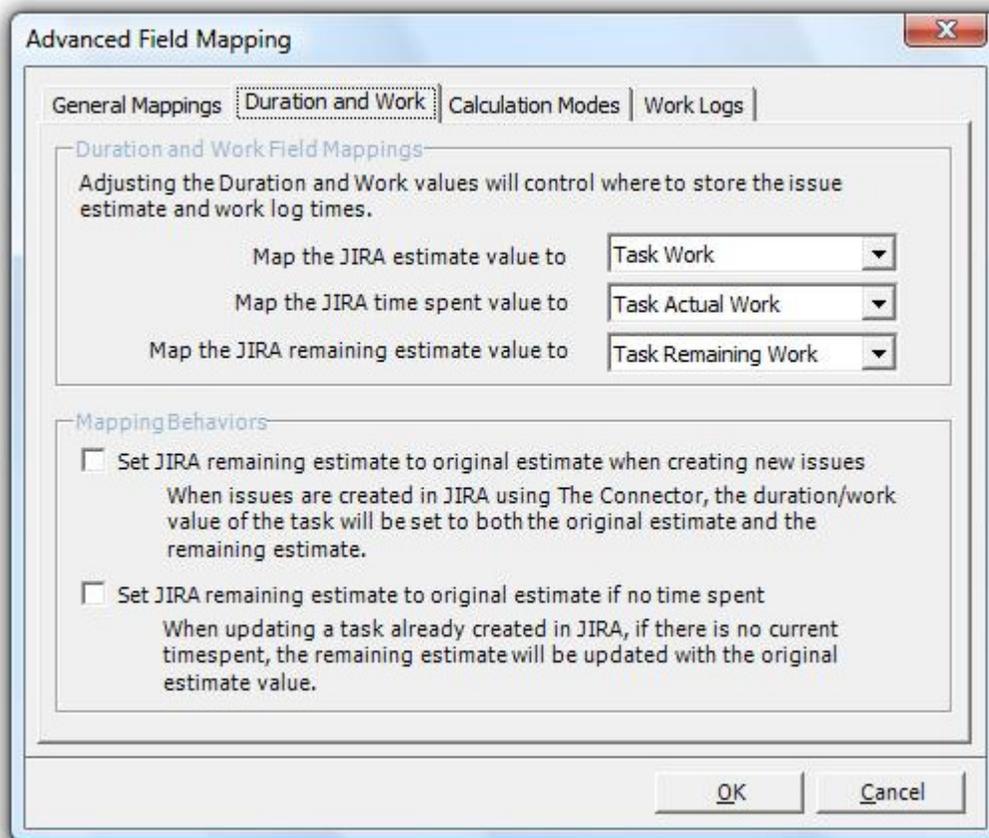
When this option is checked, only the sub-task issues will get the assignment updated. You are free to set the assignment value in Microsoft Project to anything you want but The Connector will ignore these values.

Update Actual Work/Duration to the JIRA Time Spent

If this option is checked and you perform the "Send To JIRA" function, the actual work or actual duration field of Microsoft Project will get updated to the JIRA time spent field. Typically the time spent field in JIRA is accumulated as work log entries are made. Enabling this option will overwrite those values in JIRA.

Do not update original estimate if the issue has Time Spent

This option will prevent the original estimate in JIRA from being updated if the issue currently has time spent against it. This will allow you to preserve that value is needed.



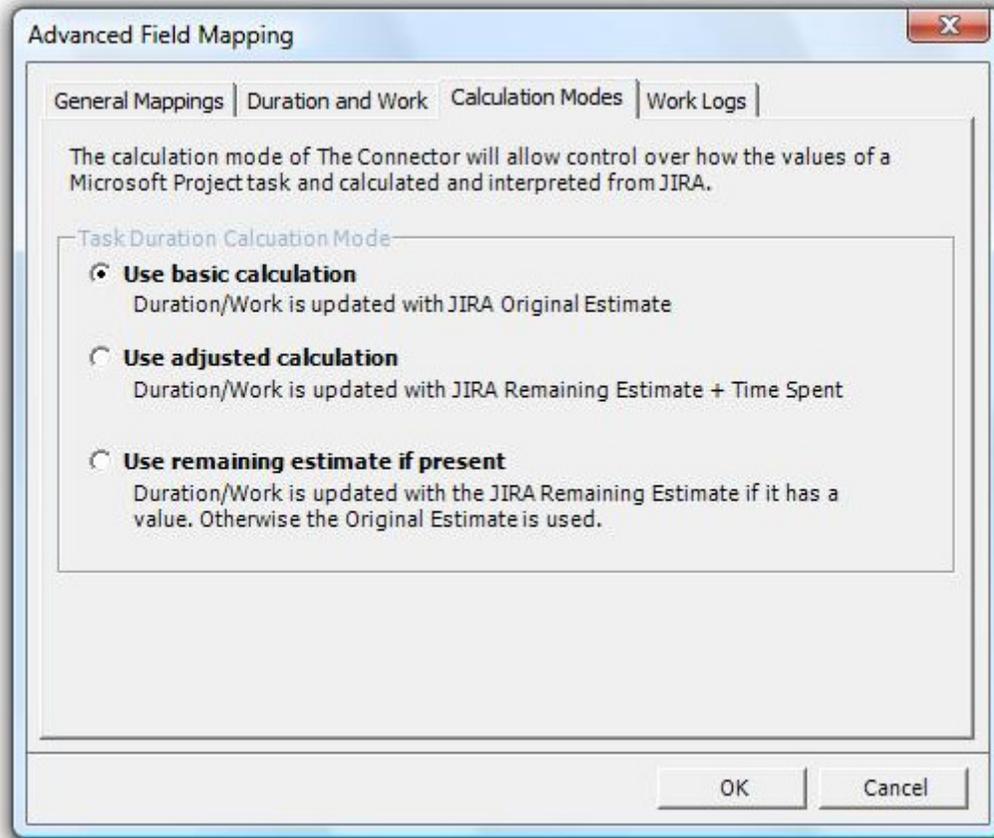
The Duration and Work tab allows you to configure where the estimate and work log values get mapped to. These values can get mapped to Microsoft Project's actual work/duration fields or planned work/duration fields, depending on your usage. You can use the option to "Do Not Map" if you wish to have The Connector ignore those values.

Set JIRA remaining estimate to original estimate when creating new issues

Enabling this option will cause The Connector to set both the original estimate and the remaining estimate to the same value when new issues are created.

Set JIRA remaining estimate to original estimate if no time spent

Enabling this option will cause the original estimate to be overwritten with the remaining estimate value ONLY if there is current no time spent on the issue.

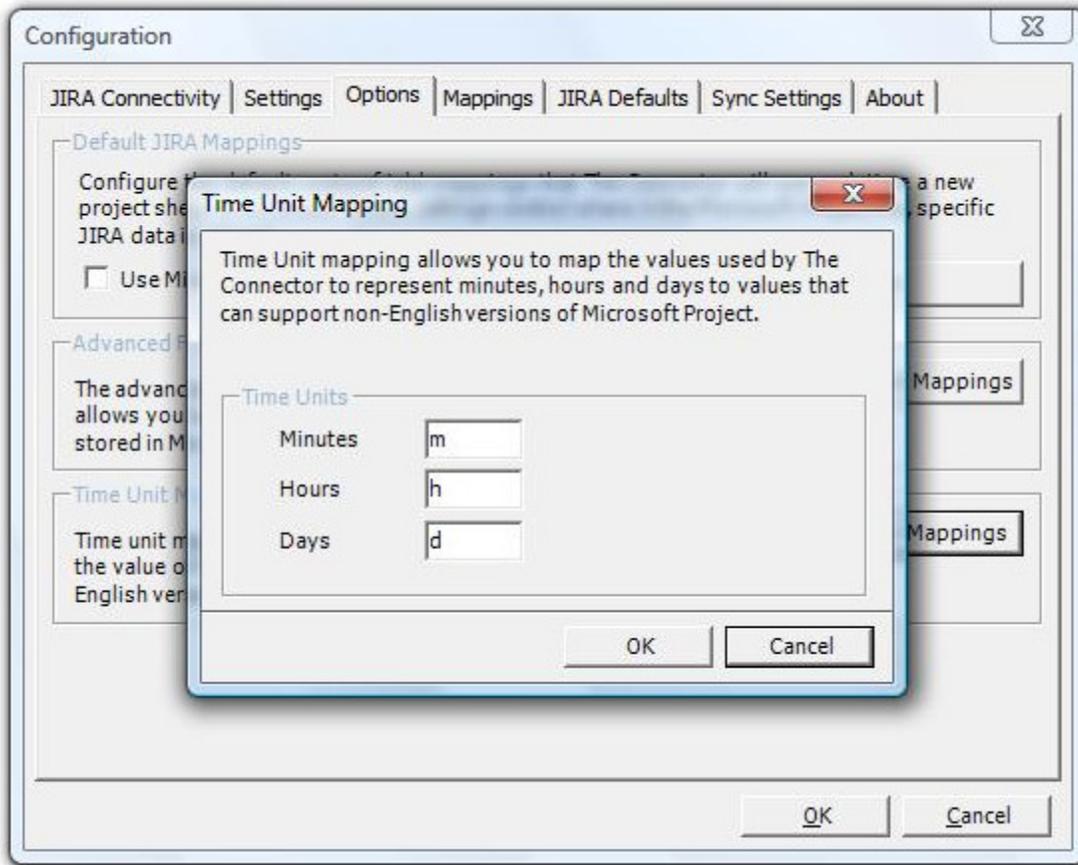


The Connector support 3 different calculation modes for calculating the percentage complete of a task.

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).

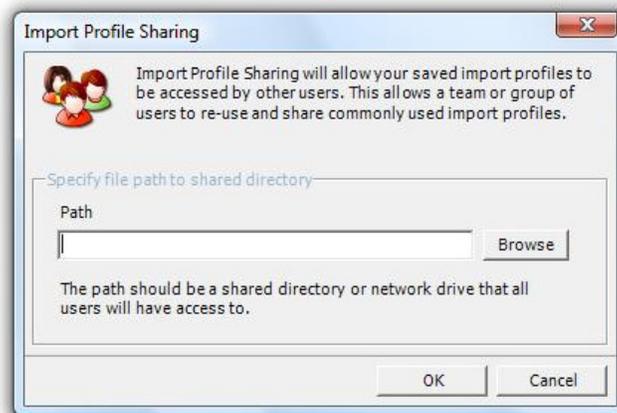
Use remaining estimate if present – This option is used if you wish to have your project plan update to reflect the “remaining effort” necessary to complete the tasks. From a scheduling standpoint, you may wish to only work against what is known left to complete. With this mode, your Microsoft Project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



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

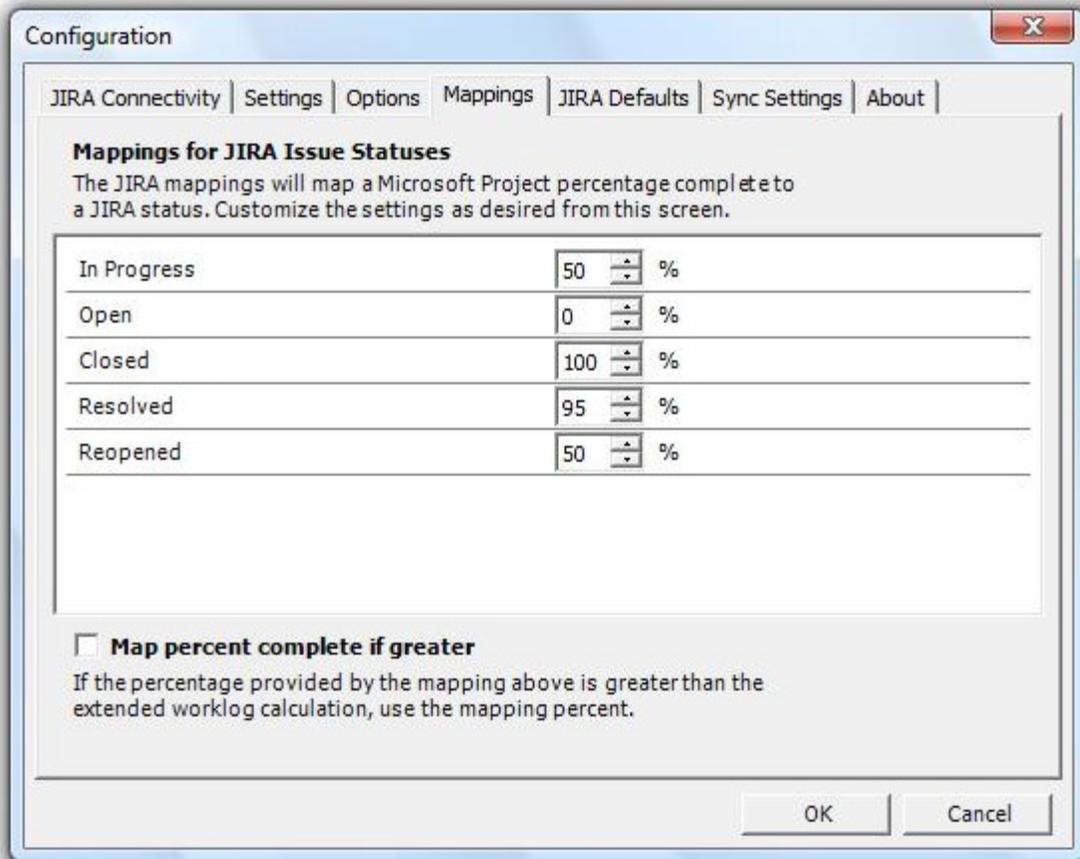
Import profile sharing allows you to specify a network location and store saved import profiles. Groups of users can all access the same location and re-use the saved profiles.



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.

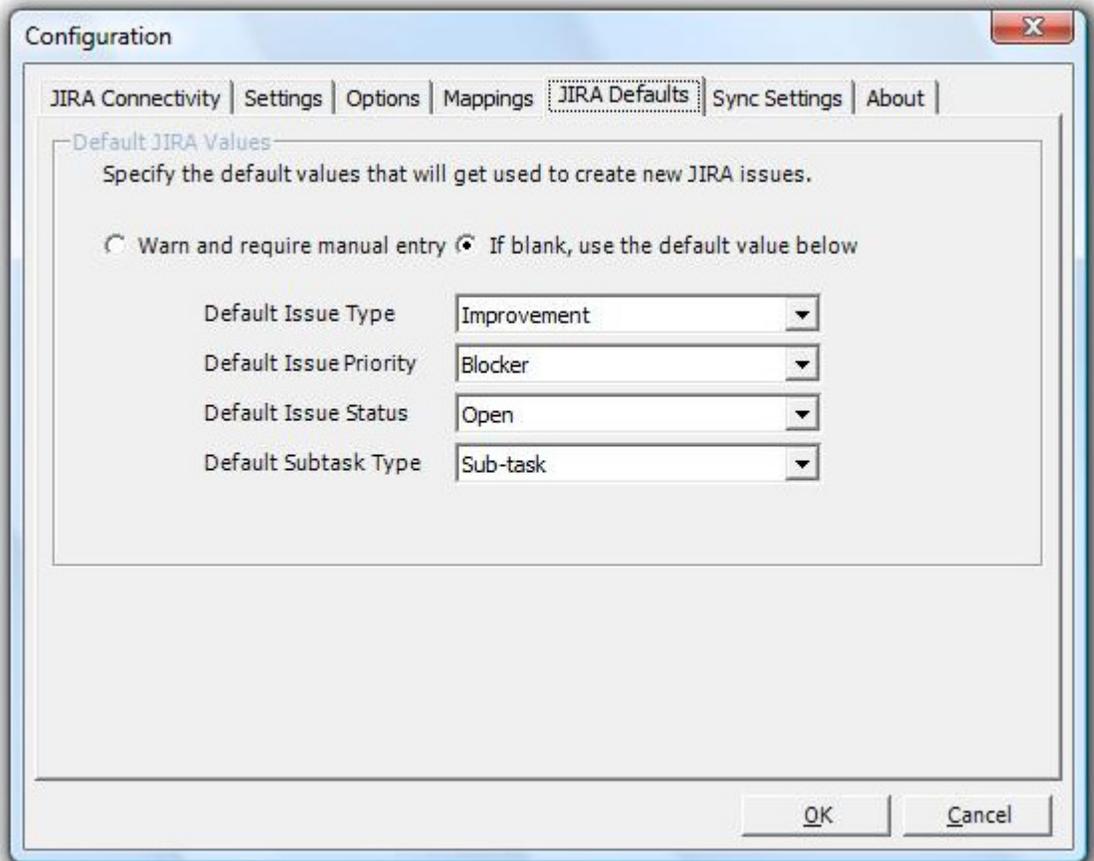
Example: If the JIRA issue is marked "In Progress", the Microsoft Project task will show as 50% complete.



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.

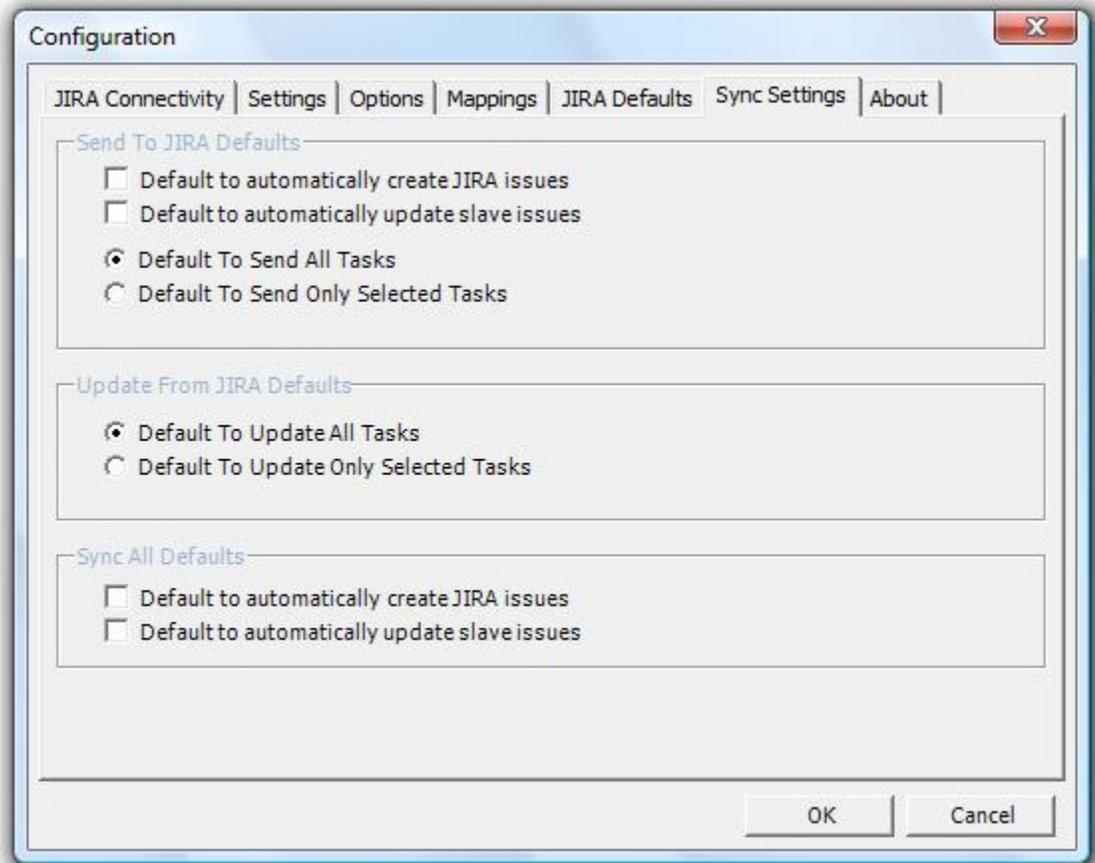


The drop-down boxes provide a list of all the current configured settings in JIRA. If you add a custom issue type to JIRA, this issue type will be available for selection in the drop-down.

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.

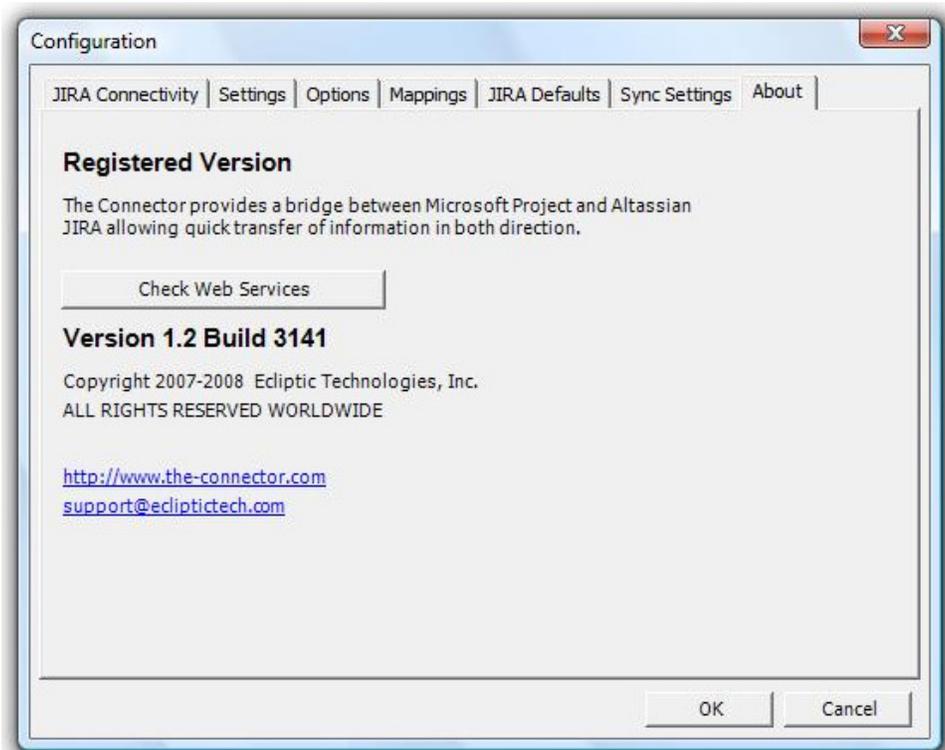
Sync

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.

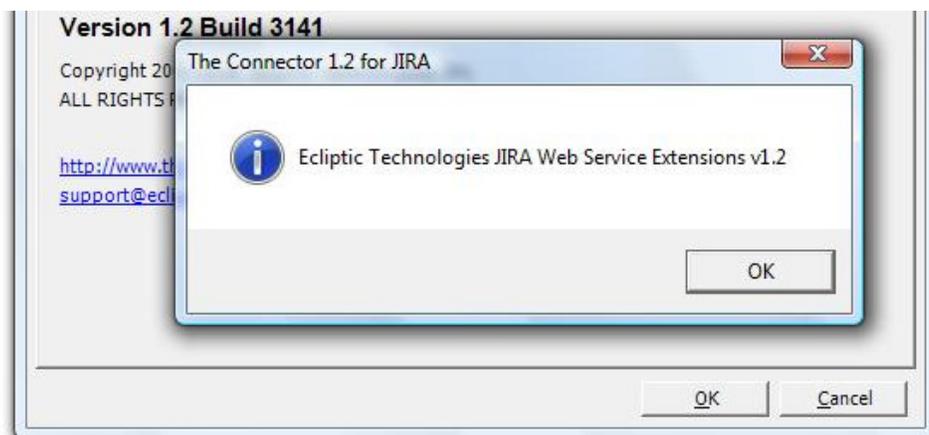


About

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.



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.



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.

	JIRA Issue ID	JIRA Project ID	Task Name	Deadline	Duration	Resource Names
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

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.

Default JIRA Values

Specify the default values that will get used to create new JIRA issues.

Warn and require manual entry
 If blank, use the default value below

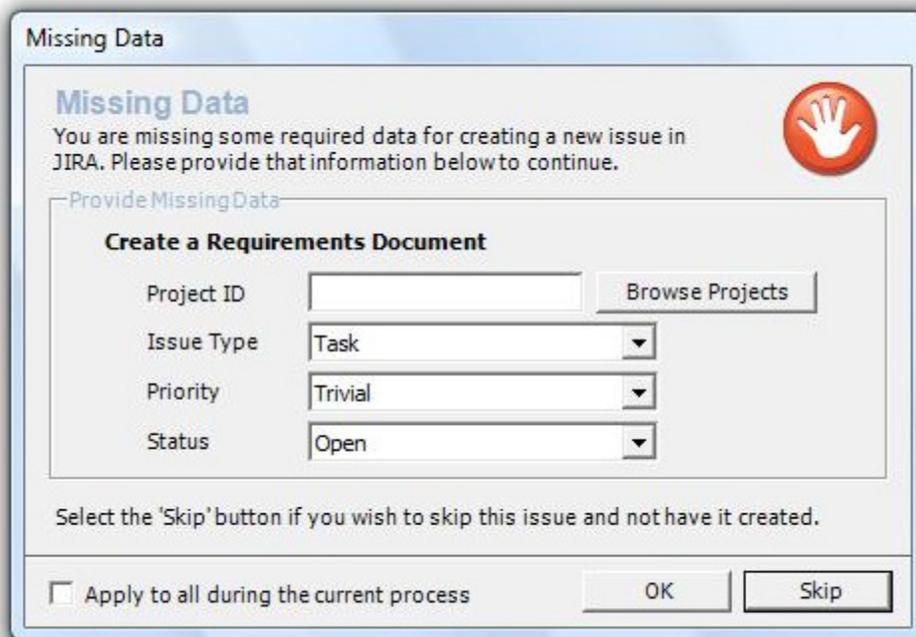
Default Issue Type:

Default Issue Priority:

Default Issue Status:

Default Subtask Type:

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.



The image shows a 'Missing Data' dialog box with a red hand icon. The title is 'Missing Data'. The main text says: 'You are missing some required data for creating a new issue in JIRA. Please provide that information below to continue.' Below this is a section titled 'Provide Missing Data' containing a sub-section 'Create a Requirements Document'. This sub-section has four fields: 'Project ID' with a text box and a 'Browse Projects' button; 'Issue Type' with a dropdown menu showing 'Task'; 'Priority' with a dropdown menu showing 'Trivial'; and 'Status' with a dropdown menu showing 'Open'. Below the fields, it says: 'Select the 'Skip' button if you wish to skip this issue and not have it created.' At the bottom, there is a checkbox for 'Apply to all during the current process' and two buttons: 'OK' and 'Skip'.

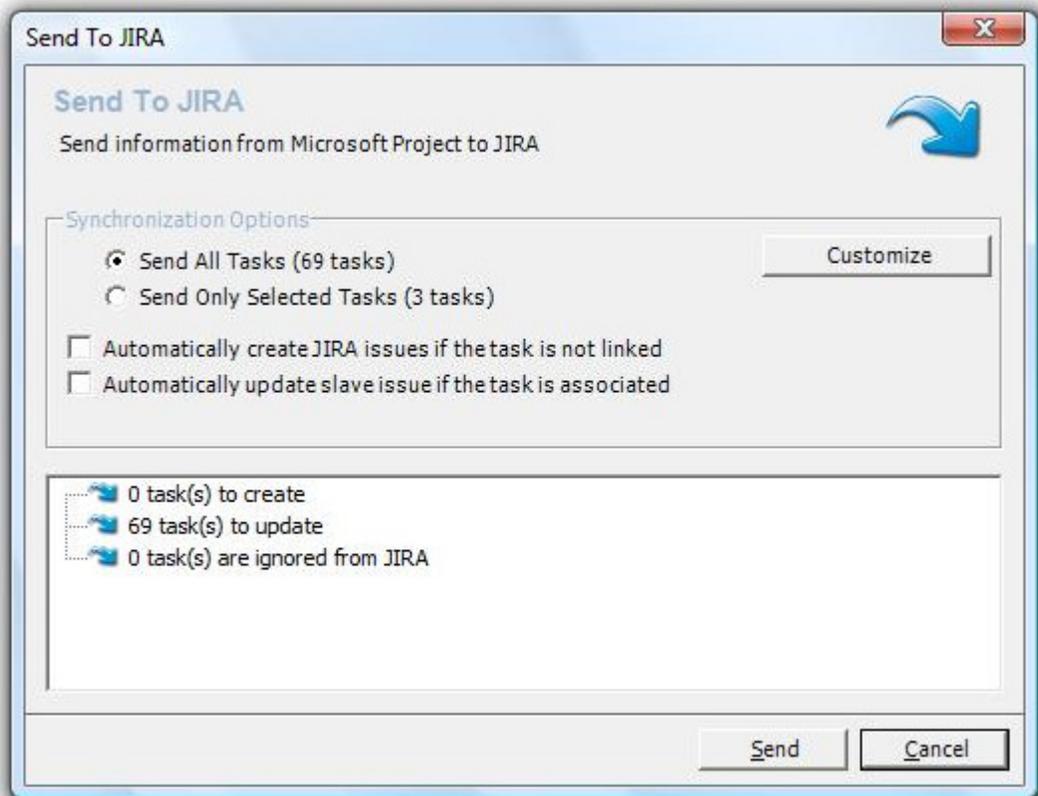
You can use the Browse Projects function to get a list of available projects to select. Use the "Apply to all during the current process" will use the settings you specify for any other tasks that are missing information.

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...

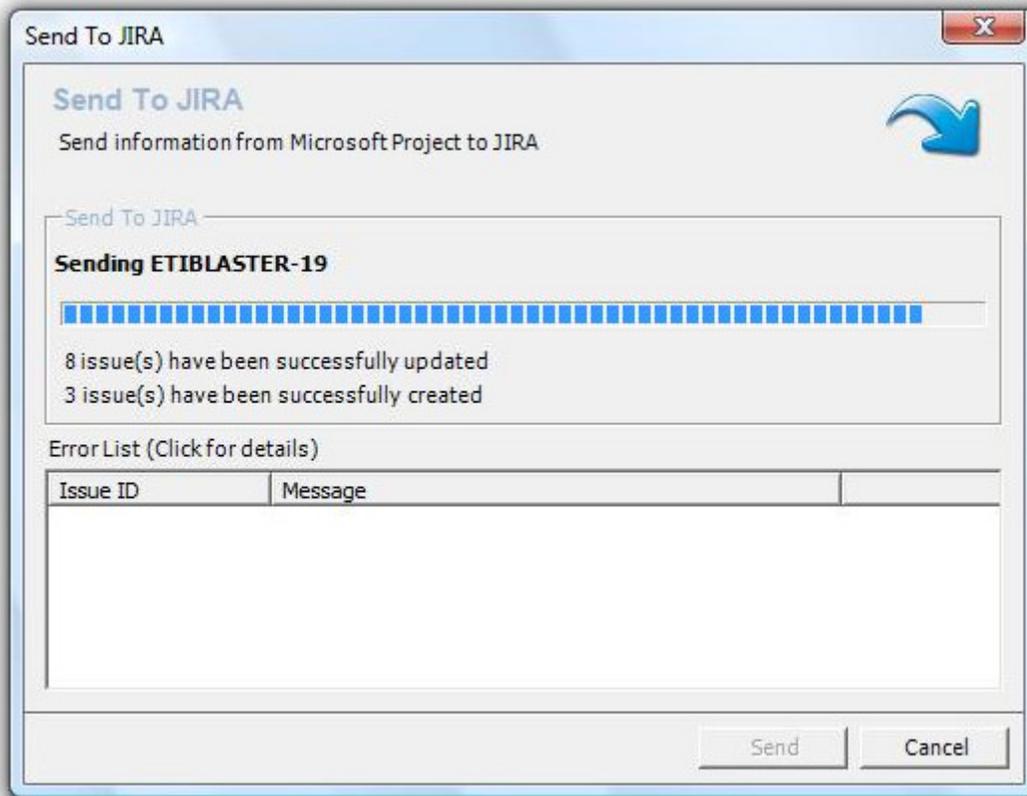
When you press the "Send To JIRA" option on the toolbar (or select it from the menu), you will get the option dialog. You can either choose to send selected tasks or send all tasks. If you choose to send only selected tasks, only those tasks highlighted in Microsoft Project will be sent.

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.



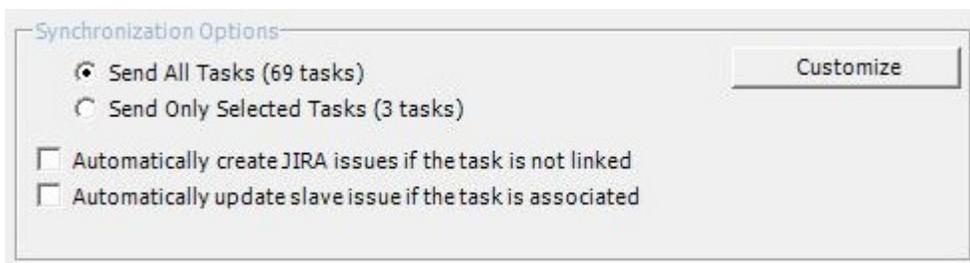
If you are using “Slave” issues, you can choose the option to automatically update the slave issue as well. A slave issue is a secondary issue that can be associated with a single task and updated at the same time as the primary task.

After the function has completed, you will be given a confirmation screen showing the number of tasks that were successfully sent to JIRA.



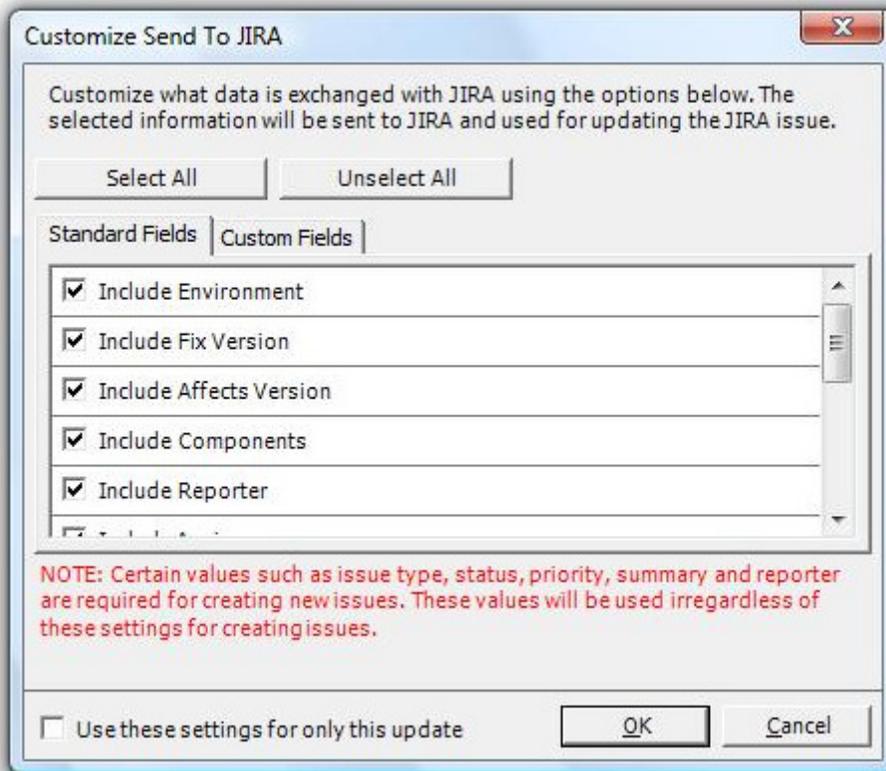
Any errors that have occurred during the process will be listed in the "Error List" at the bottom of the screen. The process does not stop when an error is encountered, so if you have 10 tasks you are sending to JIRA, and two fail, the 8 remaining will successfully update.

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



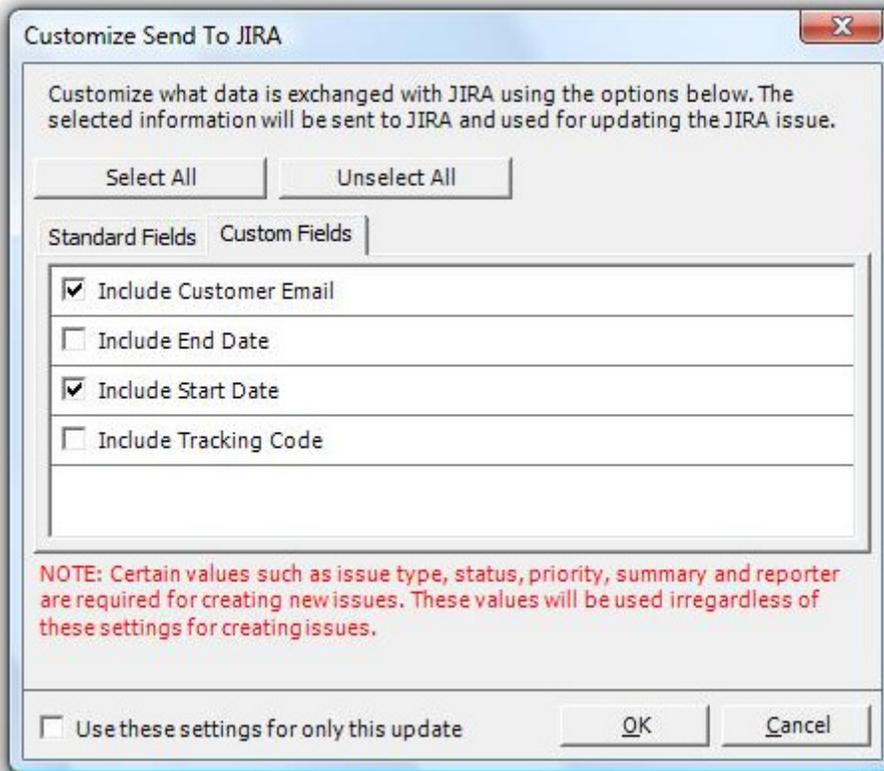
This displays a dialog with all of the pieces of data that are exchanged in the process. You can control which pieces of data get sent to JIRA from here.

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.



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

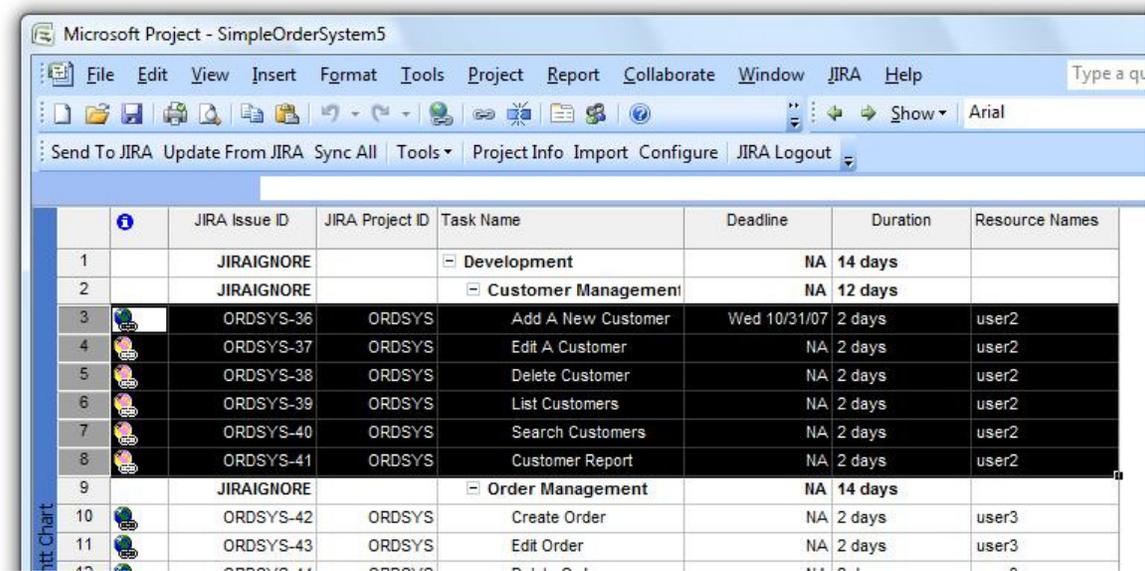
If you have custom field support enabled, you will also see a tab for "Custom Fields". This will allow you to specify which custom fields you wish to exchange with JIRA.



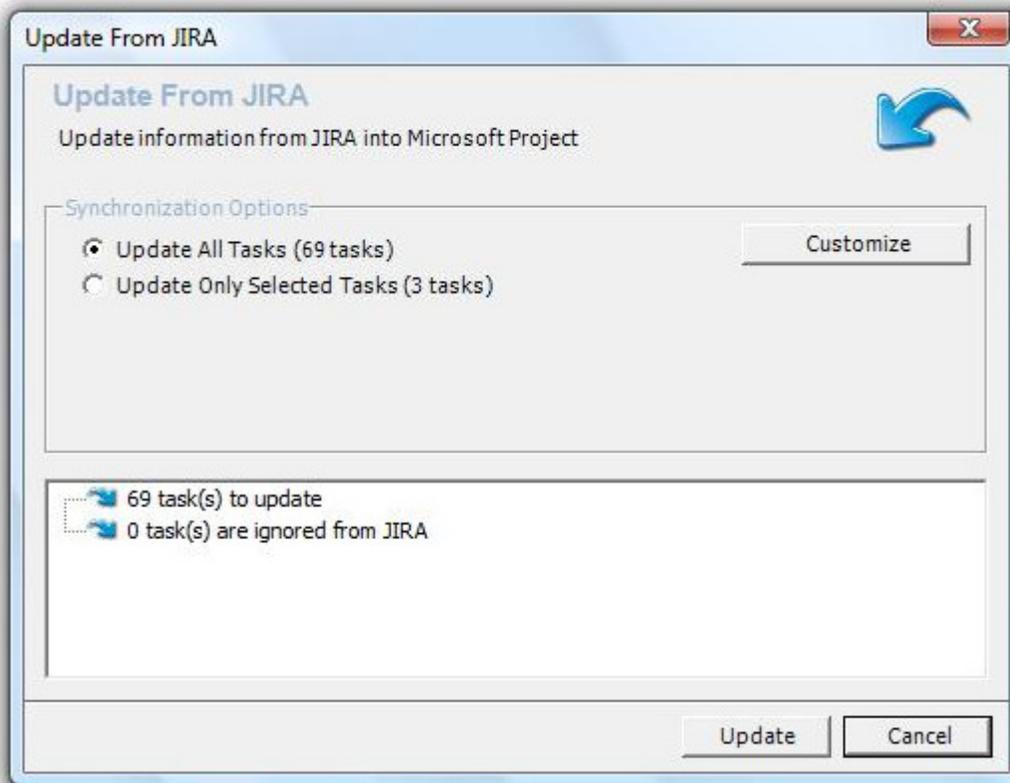
Any changes to these settings will be saved and used for all future actions. If you wish to make a change for only the current action, you can select the “Use these settings for only this update” and your changes will not be remembered.

Update From JIRA

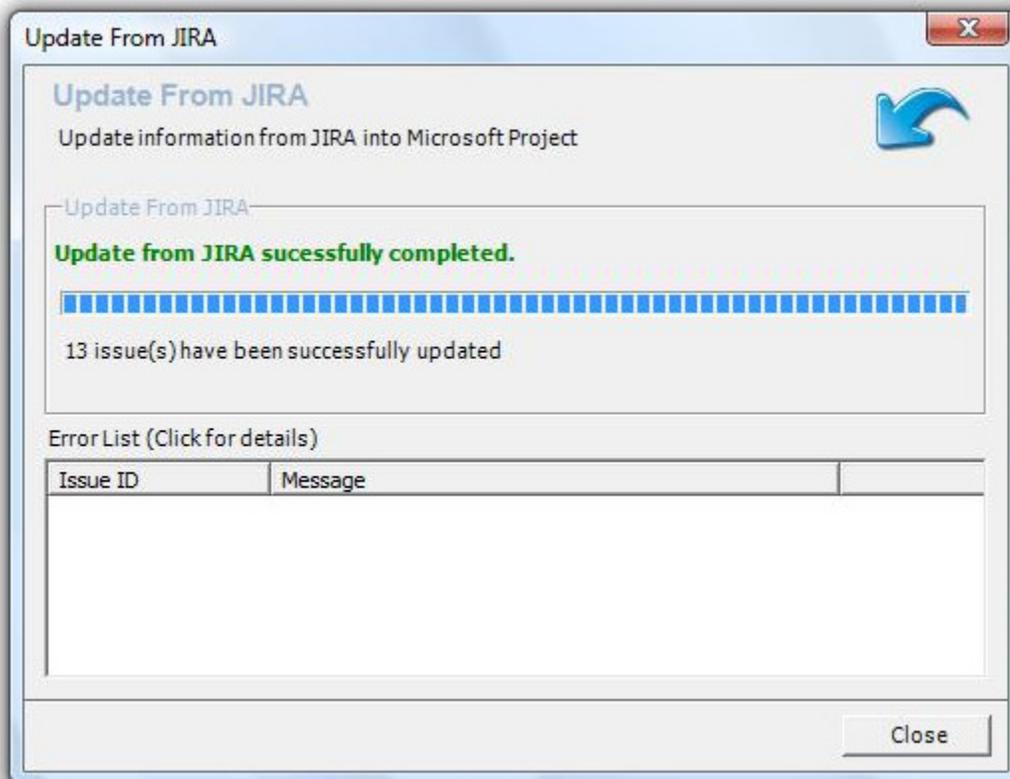
The “Update From JIRA” option allows will pull information from JIRA for the currently selected tasks. This will allow you to individually update selective portions of your project plan. To use this option, highlight the tasks you wish to have updated and press the “Update From JIRA” toolbar button.



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.

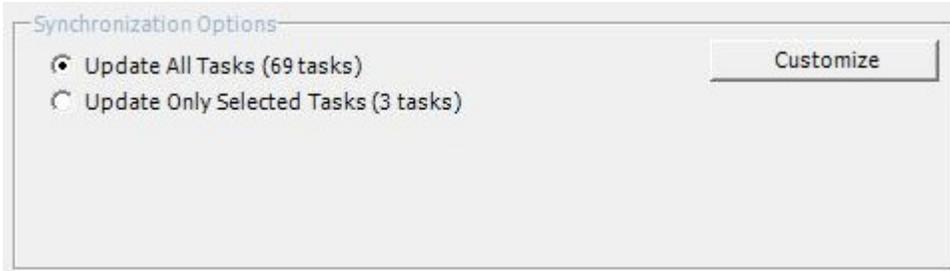


You will get a confirmation screen for each of the successfully updated tasks.



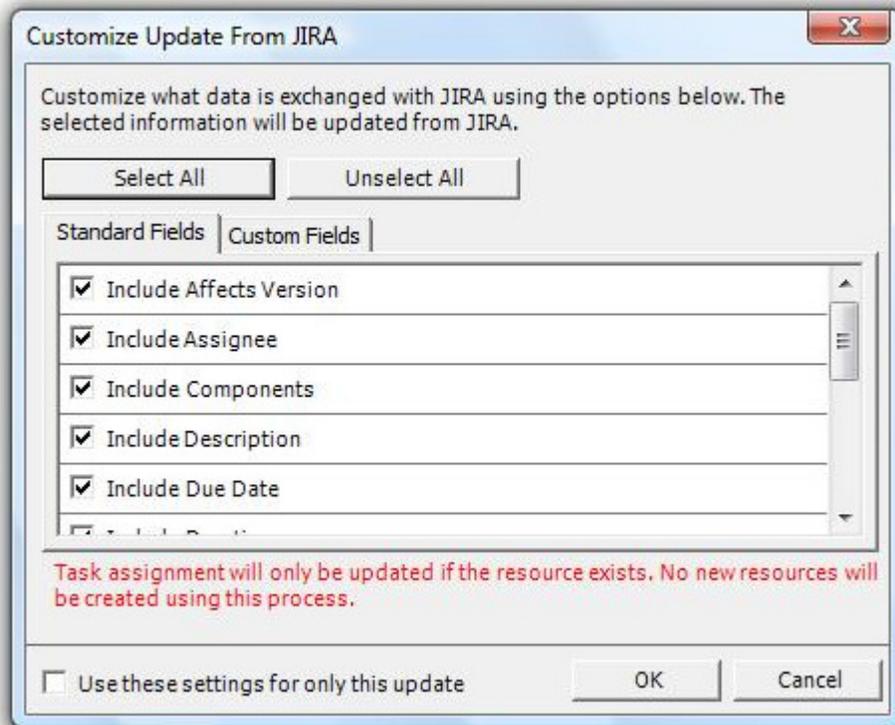
Any errors that have occurred during the process will be listed in the "Error List" at the bottom of the screen. The process does not stop when an error is encountered, so if you have 10 tasks you are updated from JIRA, and two fail, the 8 remaining will successfully update.

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



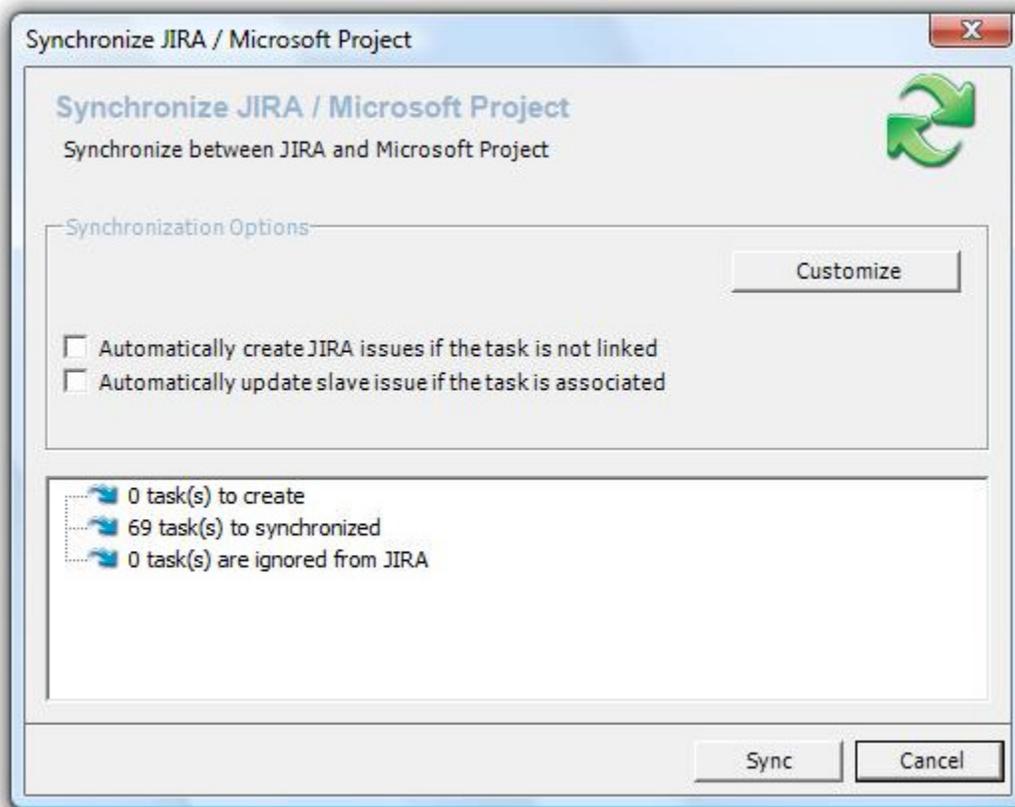
This displays a dialog with all of the pieces of data that are exchanged in the process. You can control which pieces of data get update from JIRA from here.

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.



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

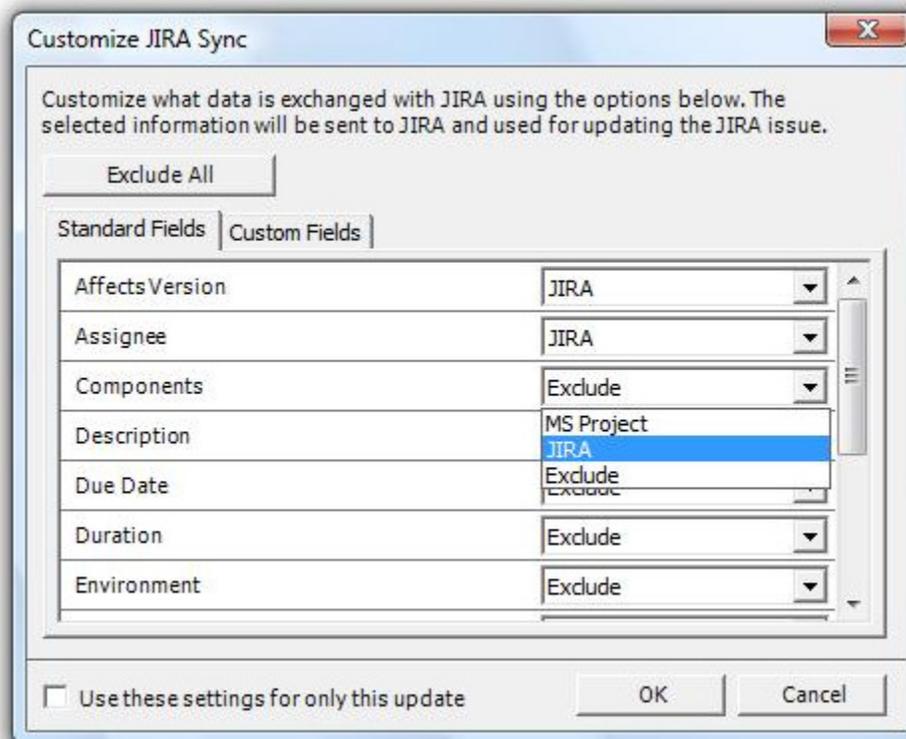
If you are using the Slave issue functionality, this process will update both the primary issue and any slave issue that is attached to the task.

You can also customize how the synchronization works by pressing the "Customize" button on this Sync All dialog. This displays a dialog with 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.



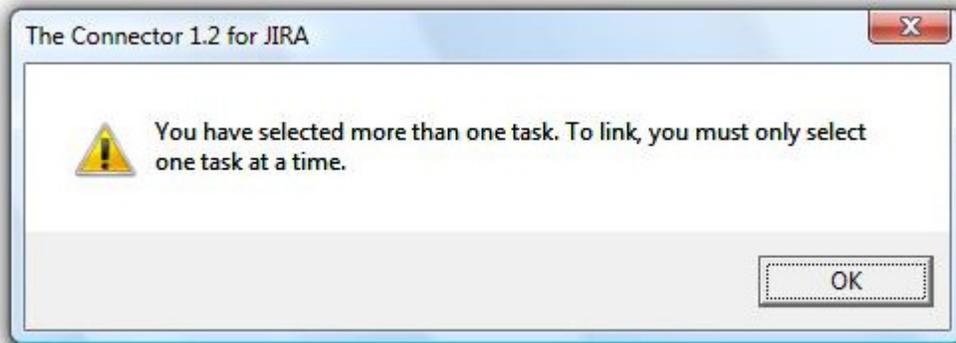
In the Customize JIRA Sync dialog, you can select how each piece of data gets handled. One of three options can be chosen:

- 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.
- 3) 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.

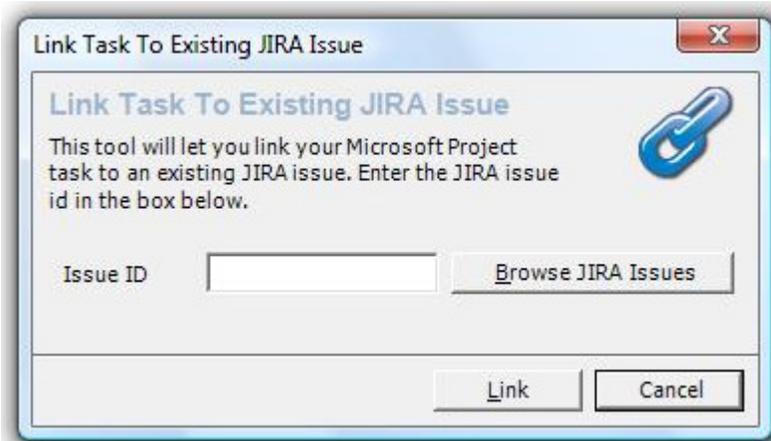
Link Issue

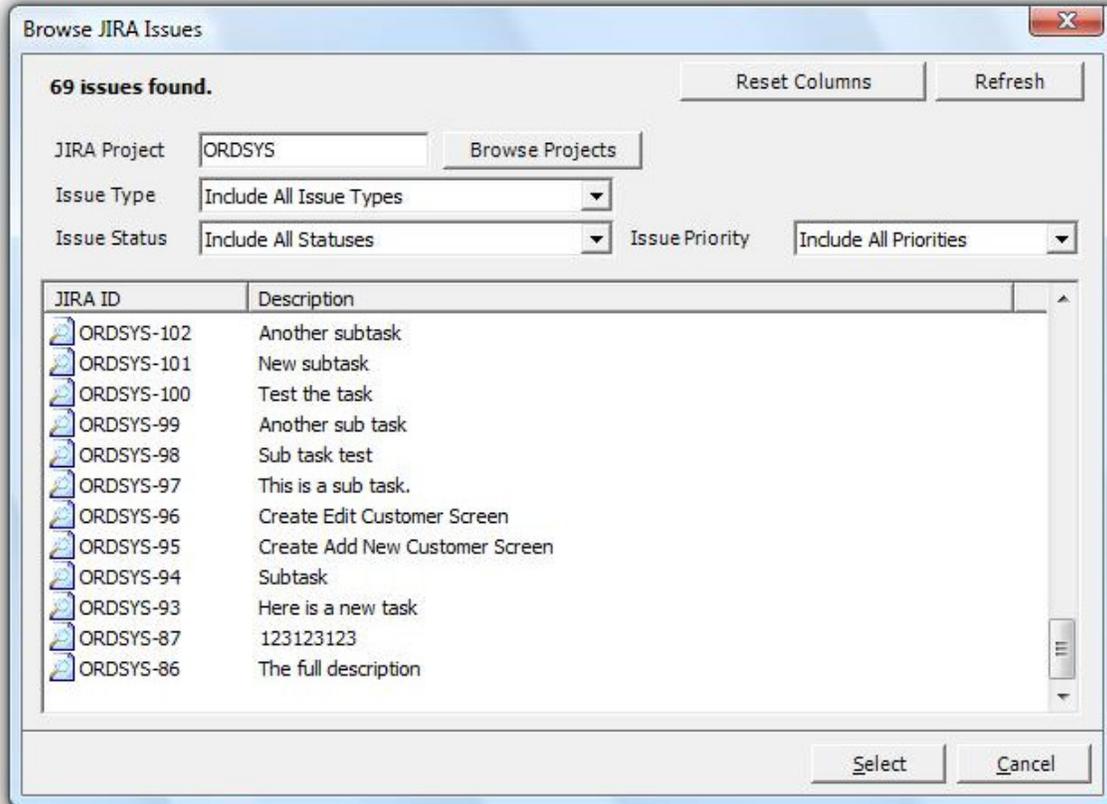
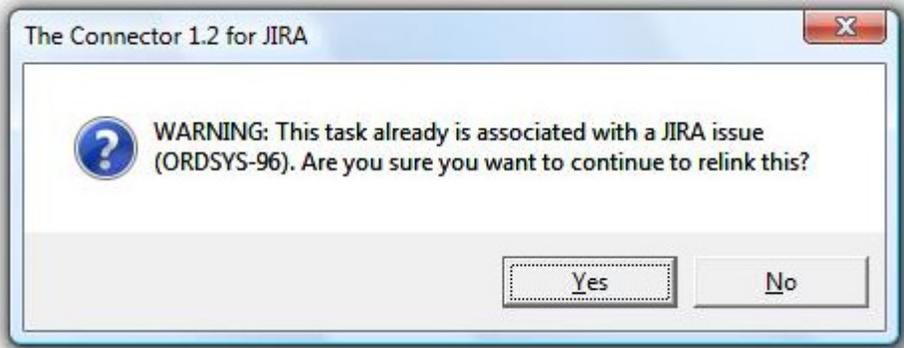
The "Link Issue" function will allow you to link existing project tasks with existing JIRA issues. This function is useful when you have tasks that have already been created in JIRA and/or are trying to repair a project plan that has been corrupted and build a complex project plan from issues that already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





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.

The screenshot shows the 'Issue Editor' dialog box. At the top, it displays 'Issue ID: ORDSYS-96' and 'Project ID: ORDSYS'. Below this is a 'Summary' field with the text 'Create Edit Customer Screen'. There are navigation buttons: '<< Previous', 'Next >>', '<< Previous Selected', and 'Next Selected >>'. A 'View JIRA Issue' link is present. On the right, there are buttons for 'Send To JIRA', 'Update From JIRA', and 'Update Group', along with a 'JIRA Ignored' checkbox. Below this is a 'Percentage Complete: 0%' indicator and a 'Click to Analyze' link. A tabbed interface shows 'Description' as the active tab, with other tabs for 'General', 'Components / Versions', 'Environment', 'Custom Fields', and 'Slave Project / Issue'. A large text area is provided for the description. At the bottom, there are 'Save' and 'Cancel' buttons.

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.

Issue Editor

General Issue Information

Issue ID: ORDSYS-96 Project ID: ORDSYS [Link](#) 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% [Click to Analyze](#) Update Group

Description General Components / Versions Environment Custom Fields Slave Project / Issue

General JIRA Information

Assigned To [Unassigned] Issue Type Improvement

Reporter jdoe Issue Status Open

Due Date 8/11/2008 Issue Priority Major

Issue has no due date Issue Resolution

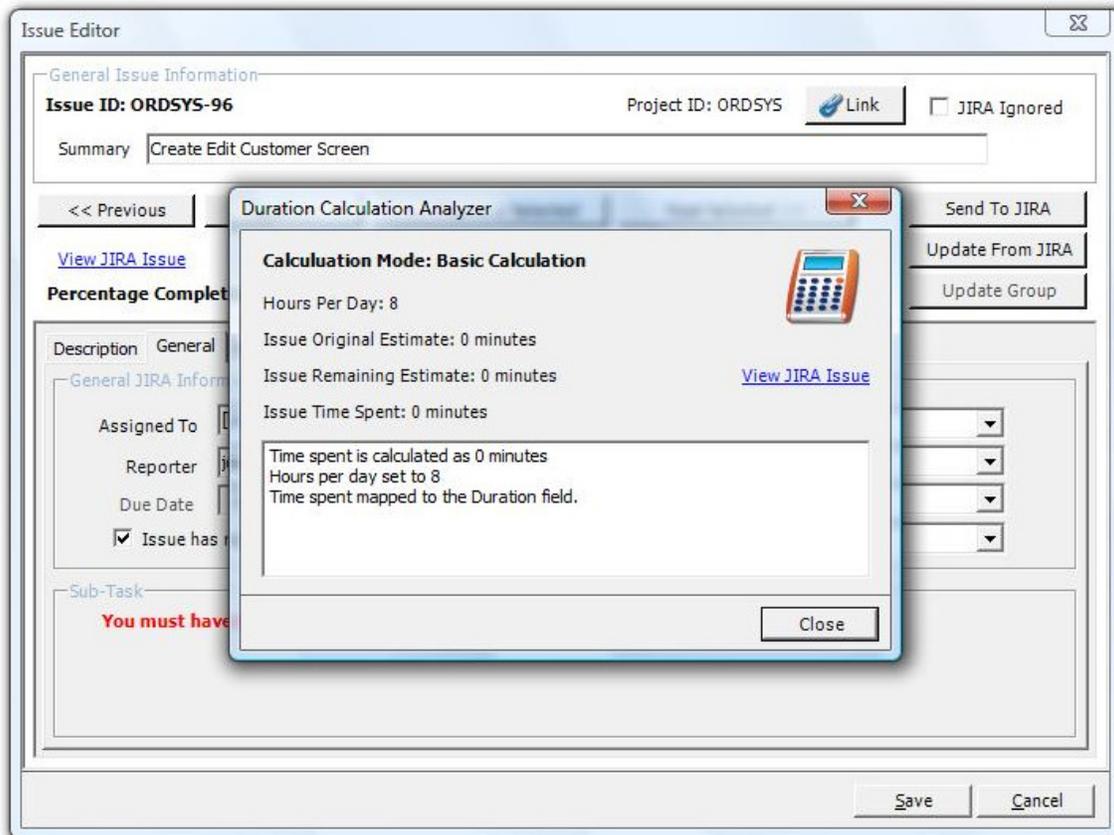
Sub-Task

You must have the Parent Issue ID field mapping configured to use sub-tasks.

Save Cancel

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.

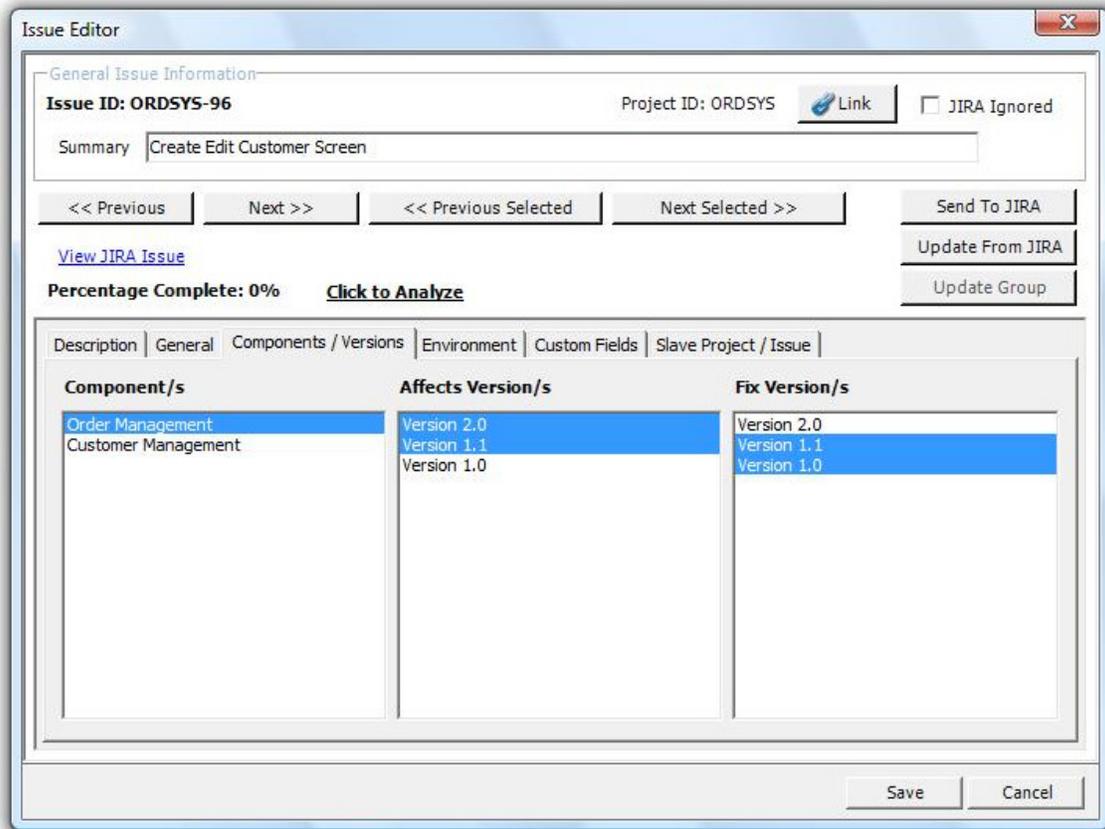
If you wish to make this task a sub-task, you this can also be set form this screen (See the *Using Sub Task* section of this document for more information).



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.

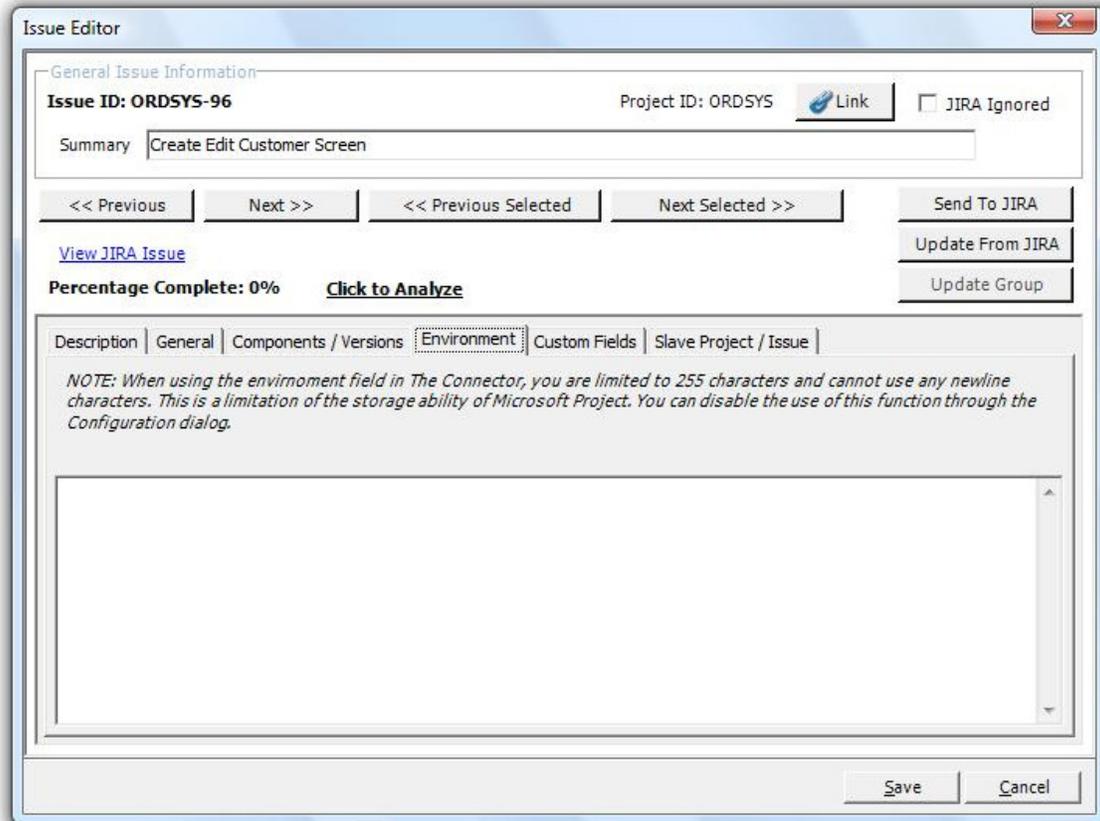
The Components – Versions tab of the issue editor will allow you to select which components, affects versions and fix versions that the issue is associated with.

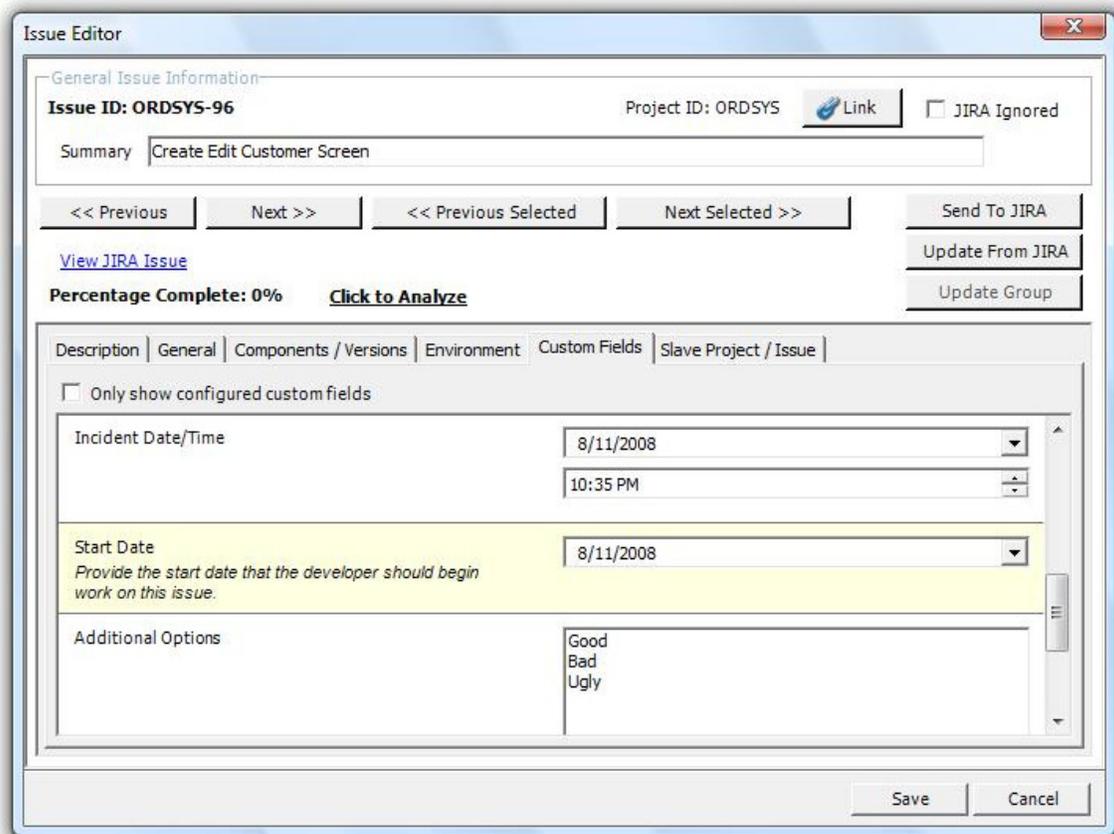


If this option is enabled under the configuration dialog, you will have the ability to view this tab. Select the desired components and versions and when the issue is synchronized with JIRA, this data will be transmitted and updated.

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.





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.

Issue Editor

Group Update

Update all of the selected tasks using the group update function. Simply set the value you want to change and press the update button to update the entire group.

<< Return To Issue

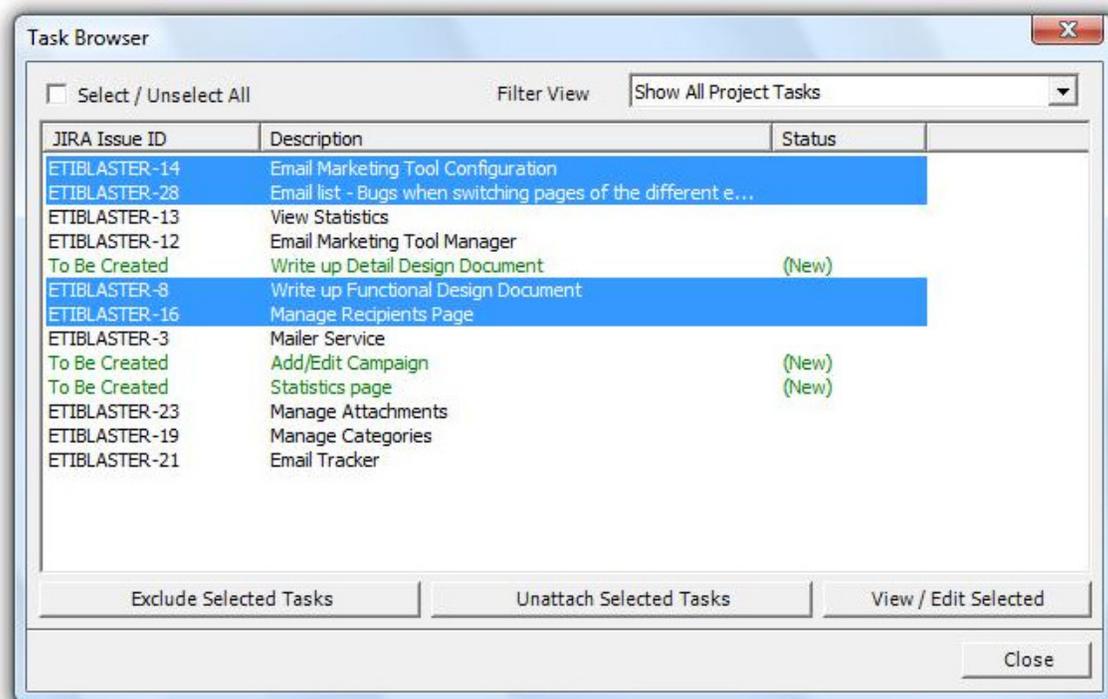
Update Project	<input type="text"/>	Select Project	Update
Update Assigned To	<input type="text"/>		Update
Update Reporter	<input type="text"/>		Update
Update Due Date	8/11/2008		Update
Update Issue Type	<input type="text"/>		Update
Update Priority	<input type="text"/>		Update
Update Status	<input type="text"/>		Update

Close

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.



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 by 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.

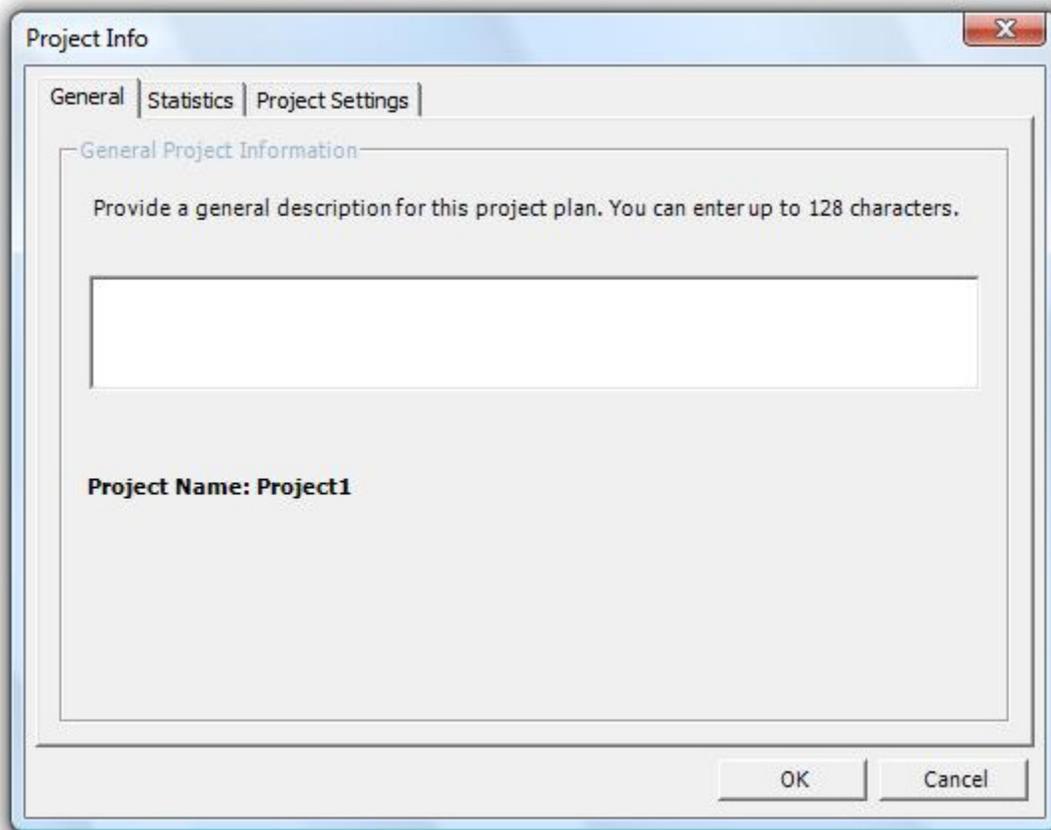
Validate Selected Tasks

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.

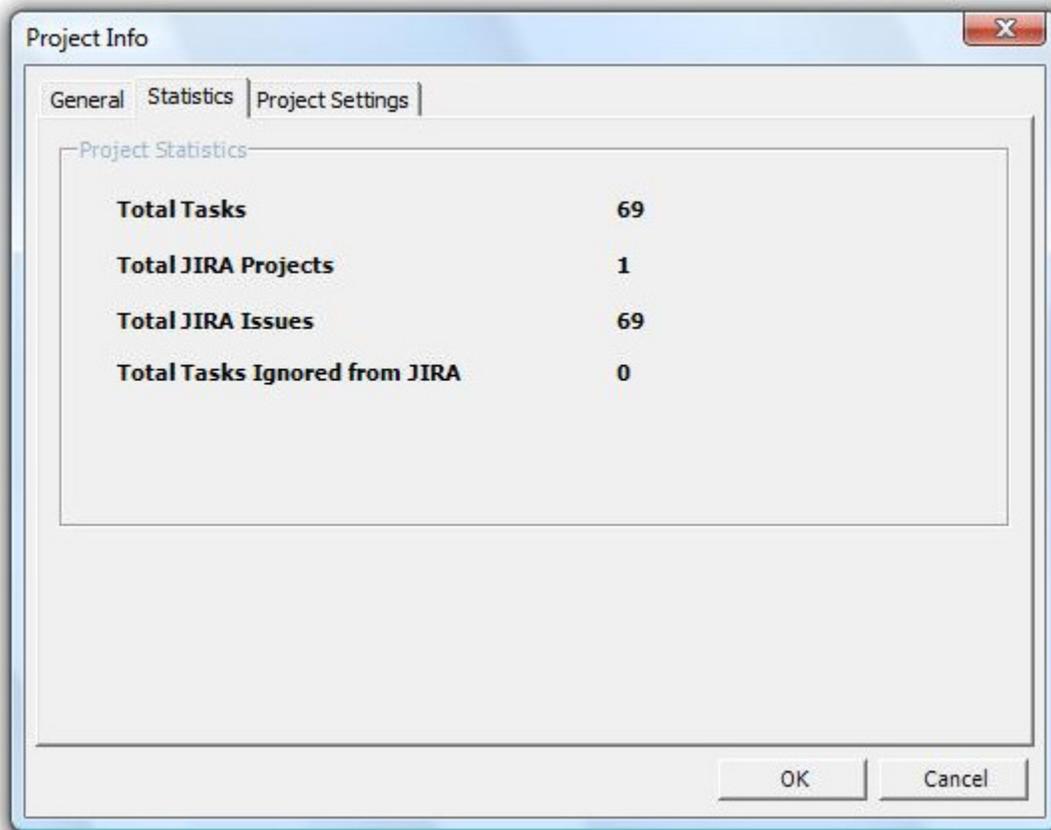
Project Info

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.

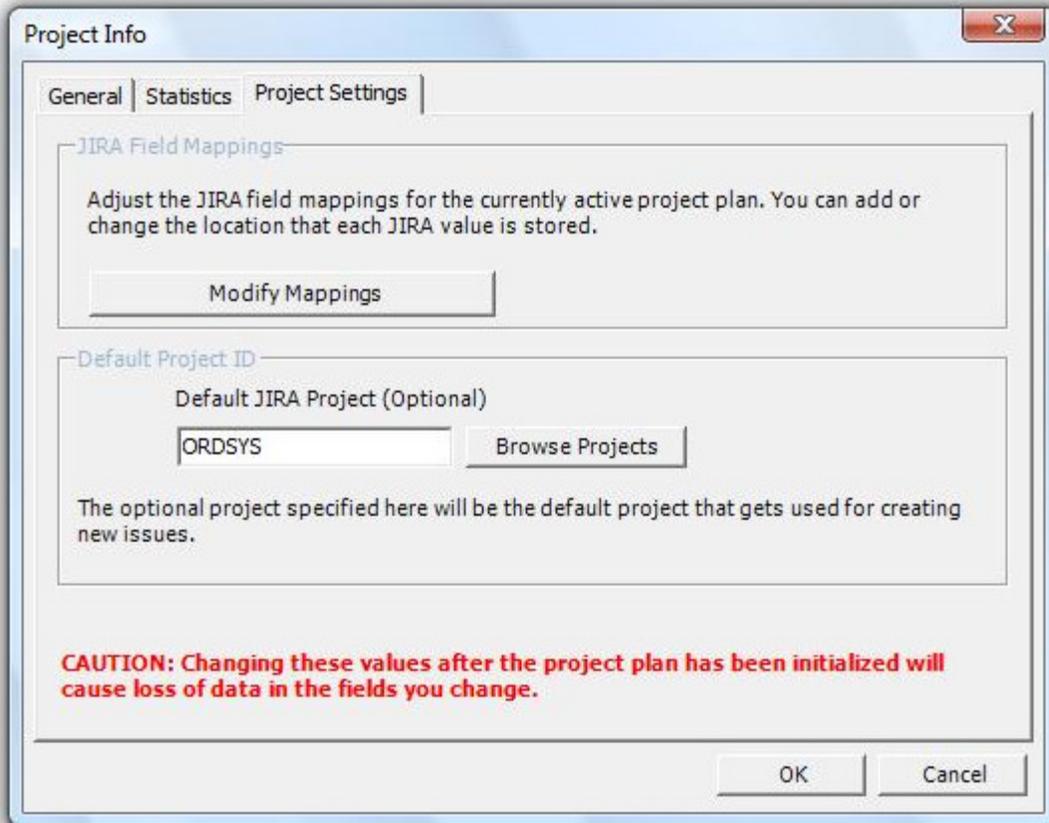


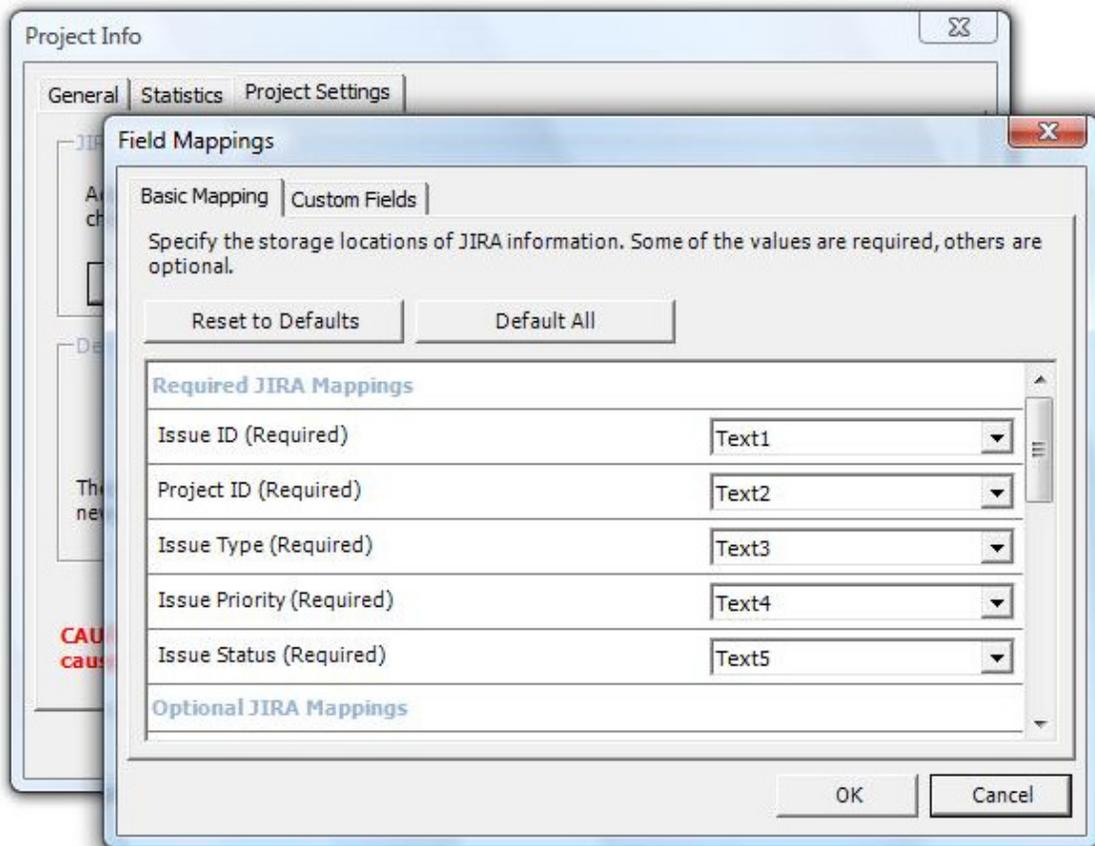
The statistics tab of the Project Info dialog shows some general counts about the current project file. It will show the total number of tasks, total JIRA projects, total JIRA issues, and the total number of tasks that are marked as JIRA ignored. This provides you with an overview of the project file.



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.





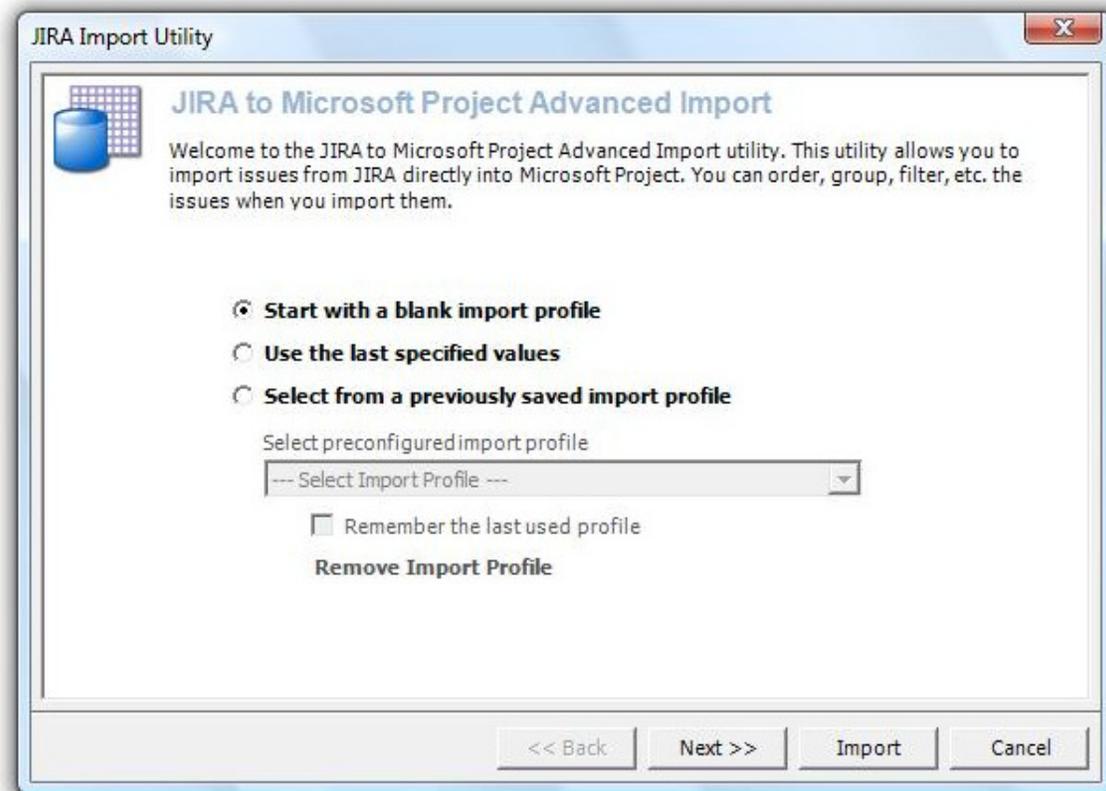
Using the “Modify Mappings” option will allow you to change the store locations that The Connector uses to place JIRA data. This is different from the Configure screen setting which are merely the defaults.

The Connector supports the ability to have different settings on each project file, so once a project is initialized, its settings must 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.



Start with a blank import profile

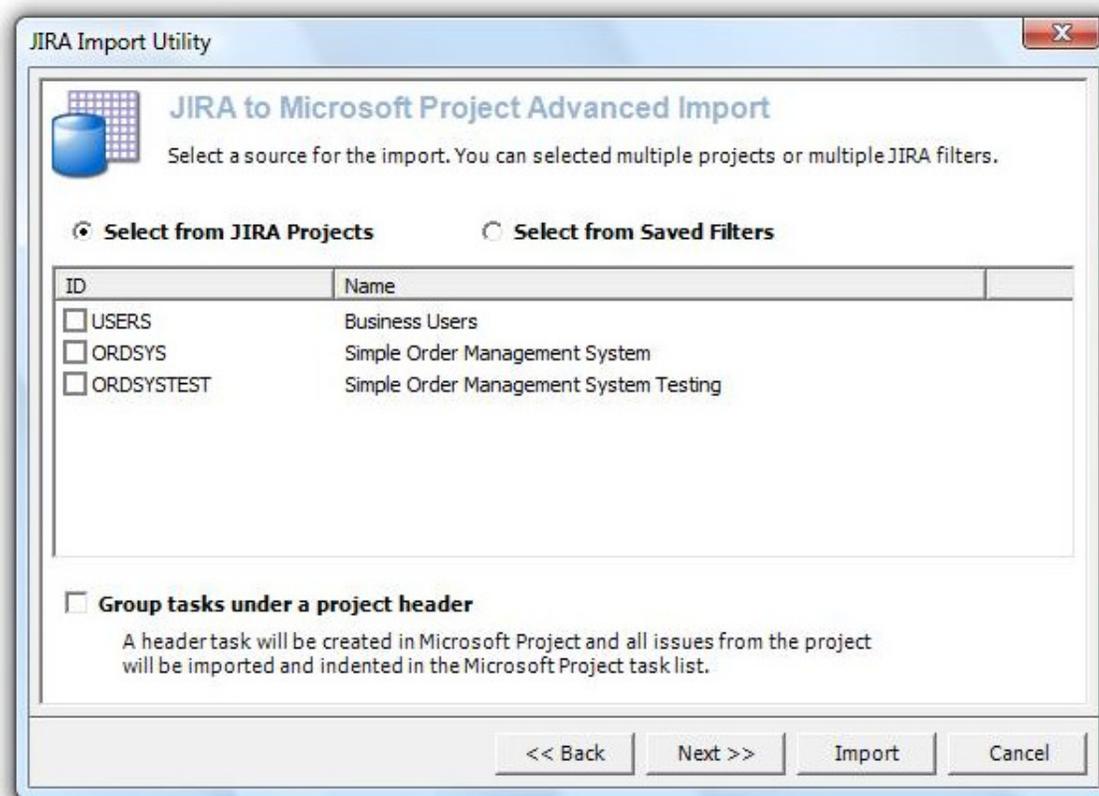
This will start with a blank profile that you can configure with the options you wish. Press the "Next >>" button to continue through the wizard.

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.



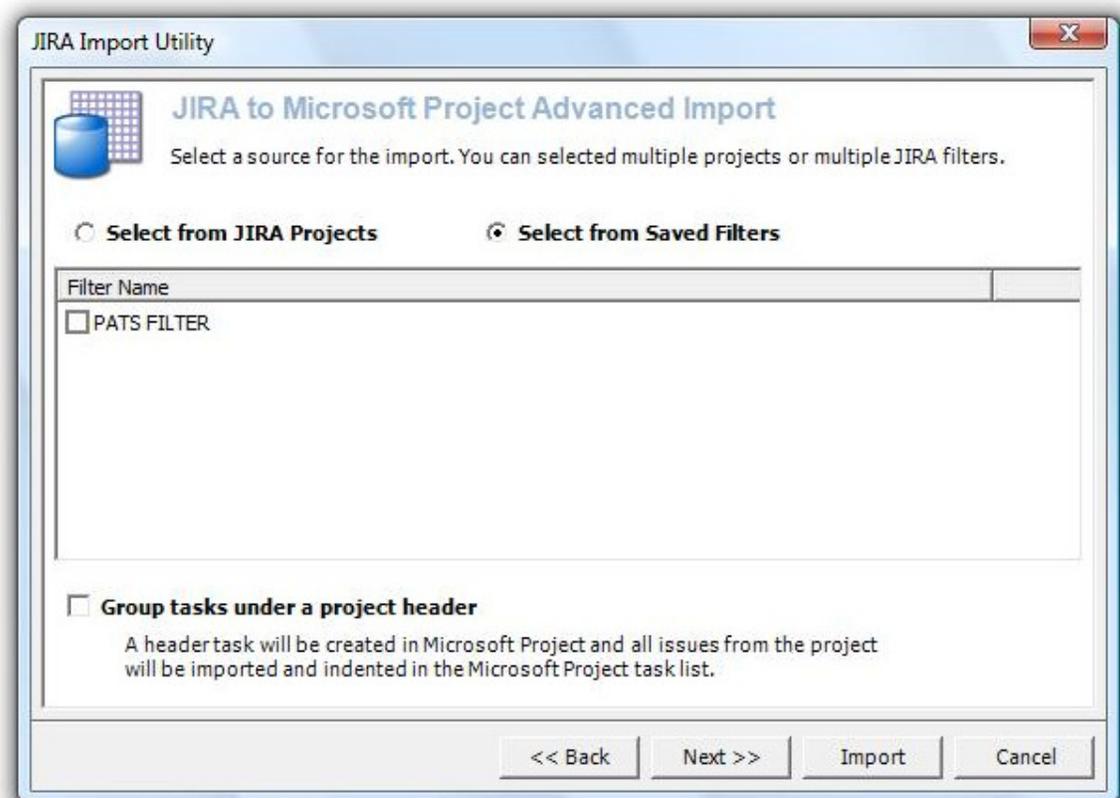
The second tab of the wizard allows you to pick which project or filters you wish to use for the import. The Connector does allow you to setup a filter within JIRA and import using that filter.

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

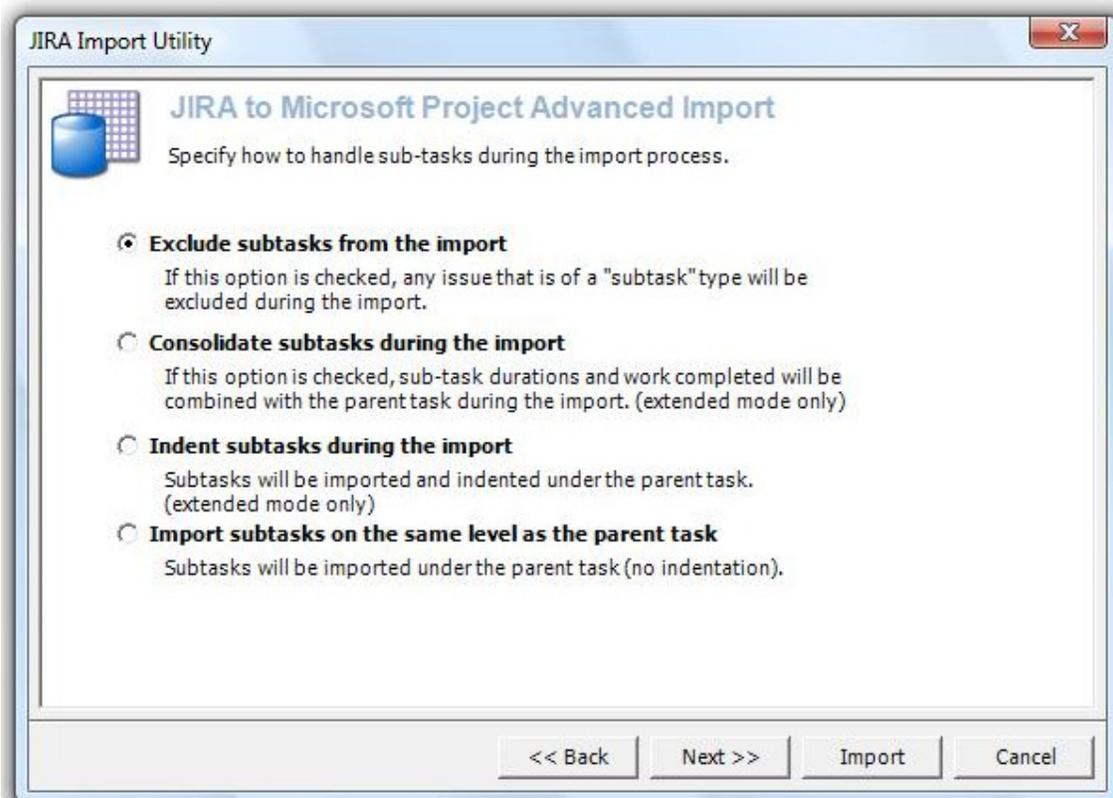
Group tasks under project header

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.

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



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.

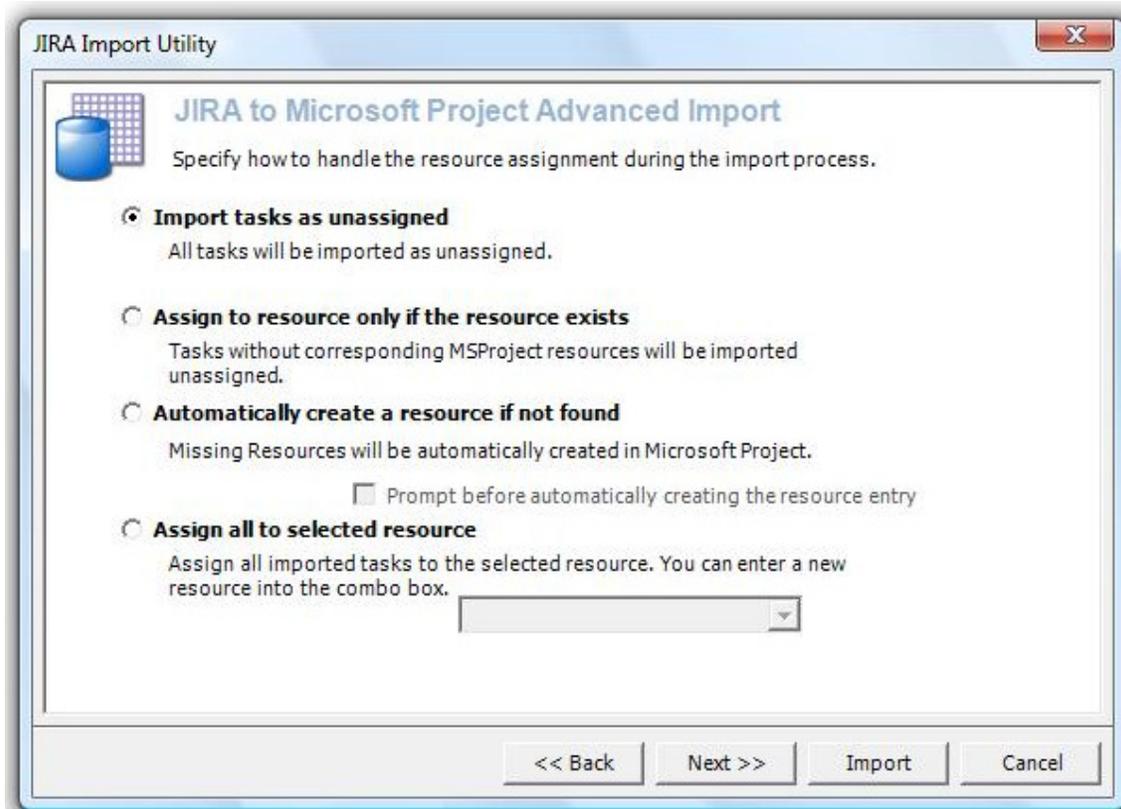
Indent subtasks during the import

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.*



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

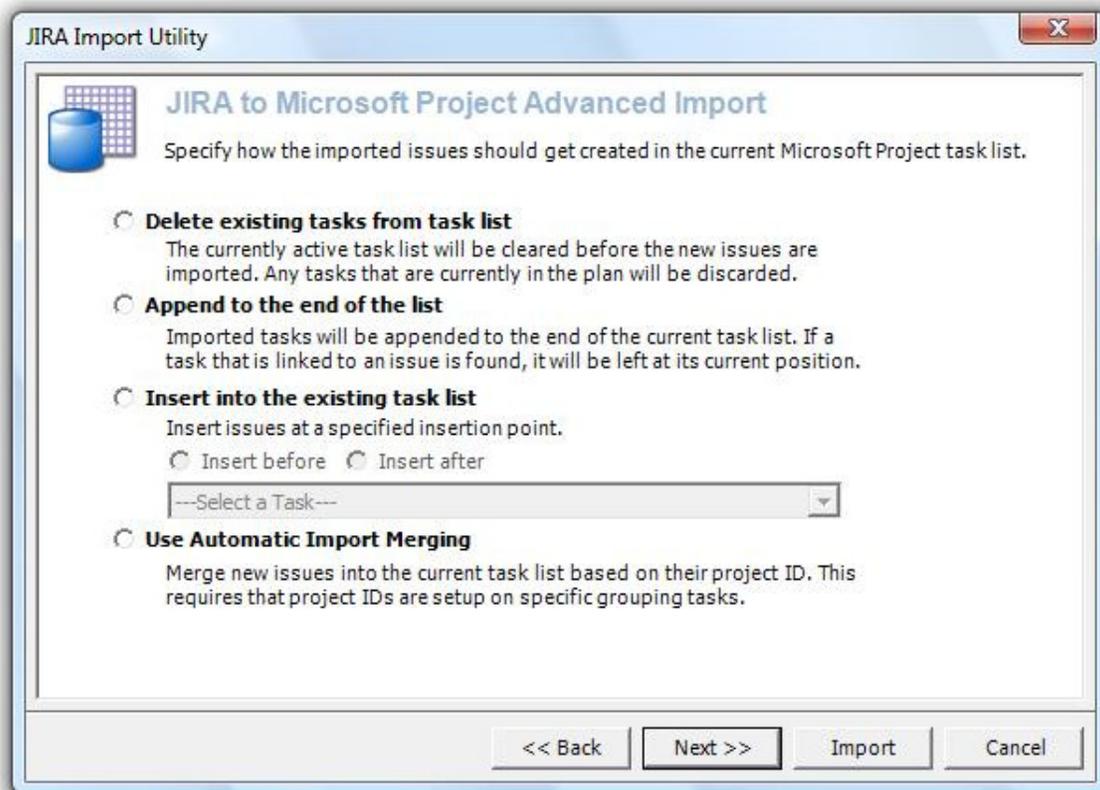
This option will assign the resource only if a matching resource can be found in the current resource sheet of the open project. New resources will not get created and you will not be prompted about any resource that is missing.

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

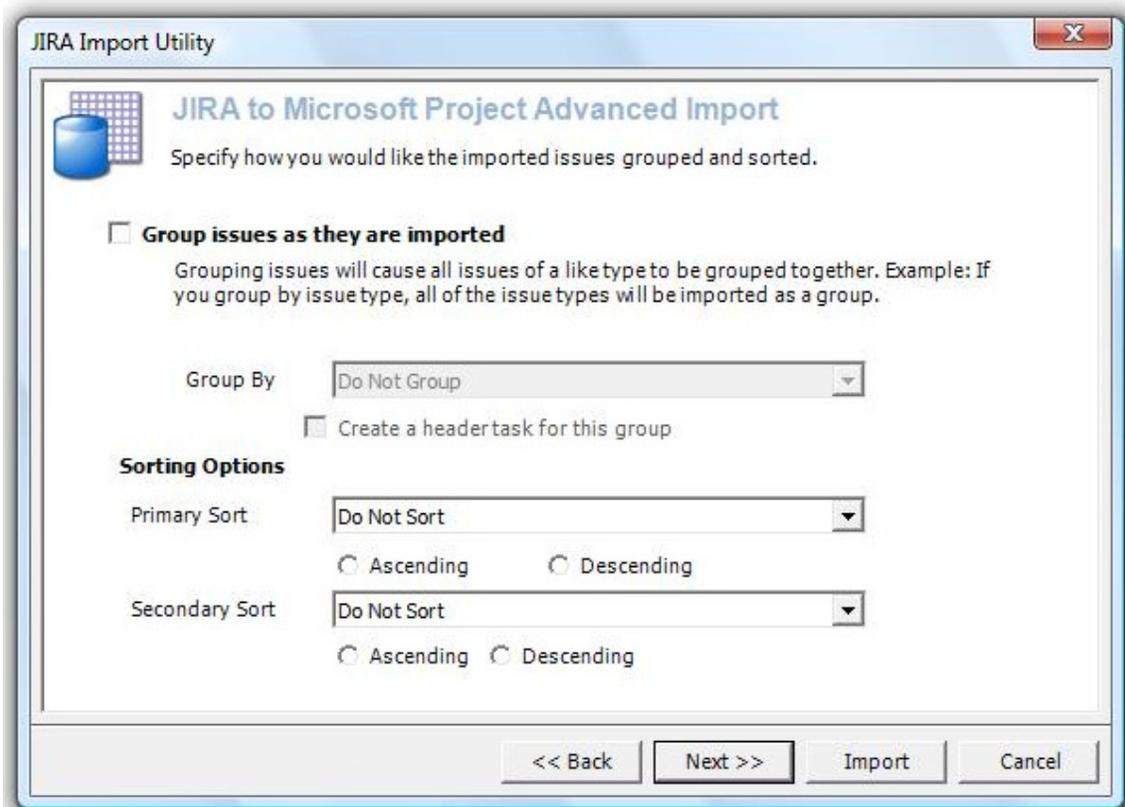
This option will clear the current task list, removing everything that is there, before importing the new issues that will get returned from the filters.

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.

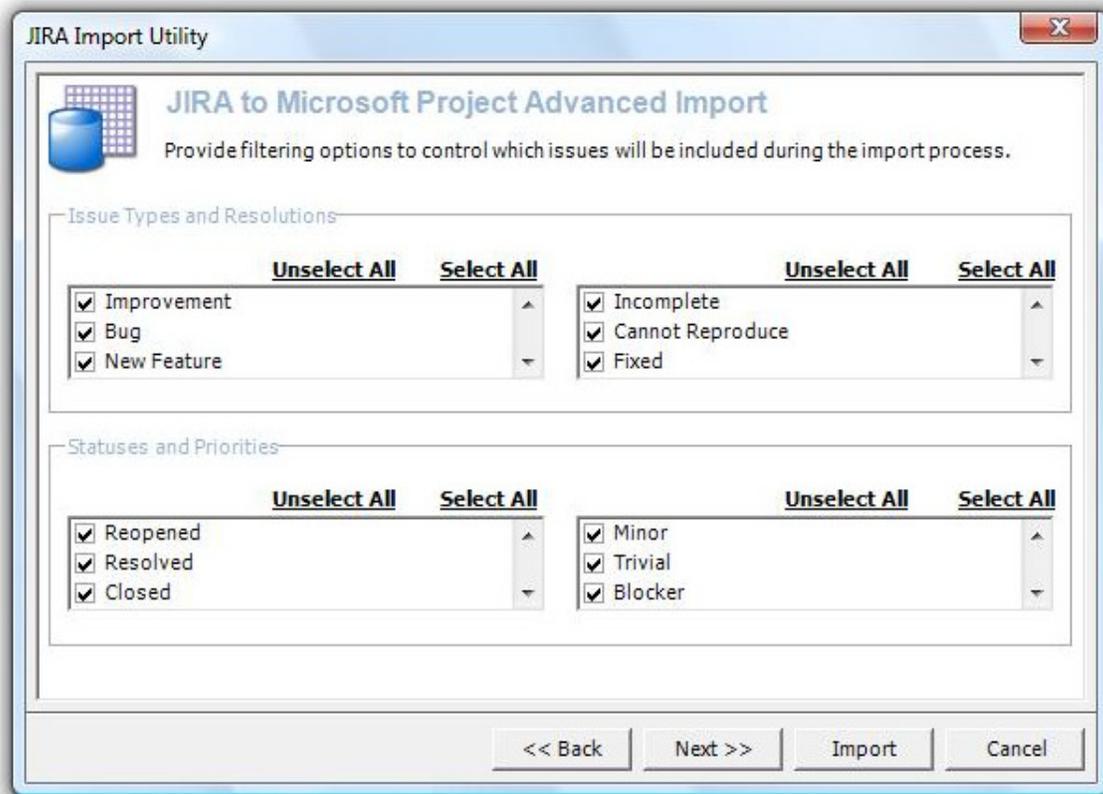


Group issues as they are imported

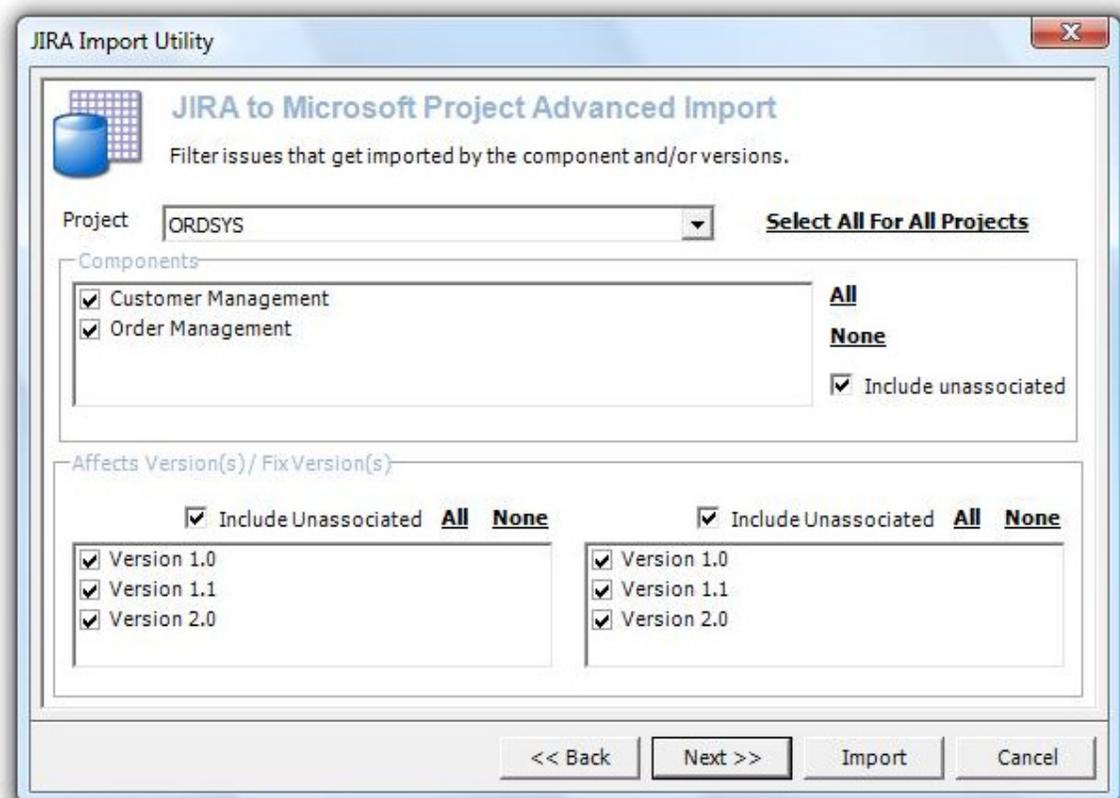
You can group the imported issues by a variety of grouping options. Grouping issues will sort by that group so that all of the like grouping issues are together. If you check the “Create a header task for this group” option, the issues will be indented under heading group.

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.

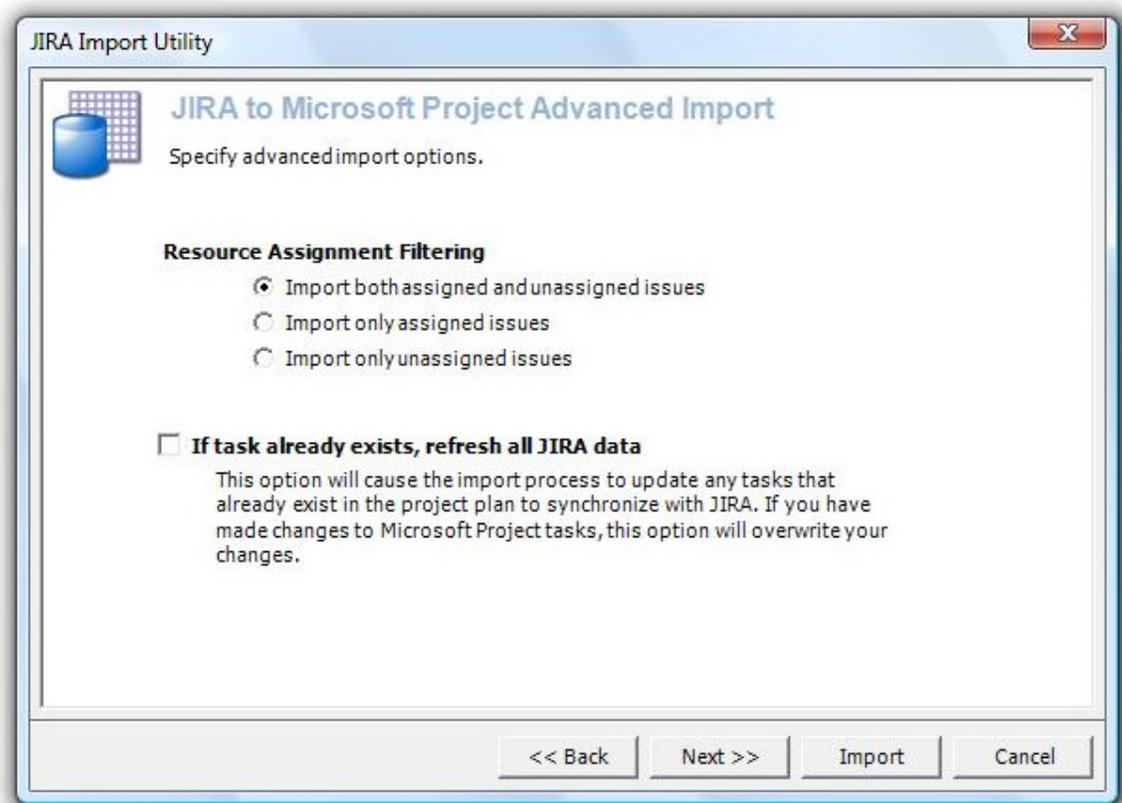


You can filter the import on the issue type, resolution, status and priority. Simply check the options you wish to have included in the import. You can use the "Unselect All" and "Select All" option for checking all the options available in a specific group.



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.



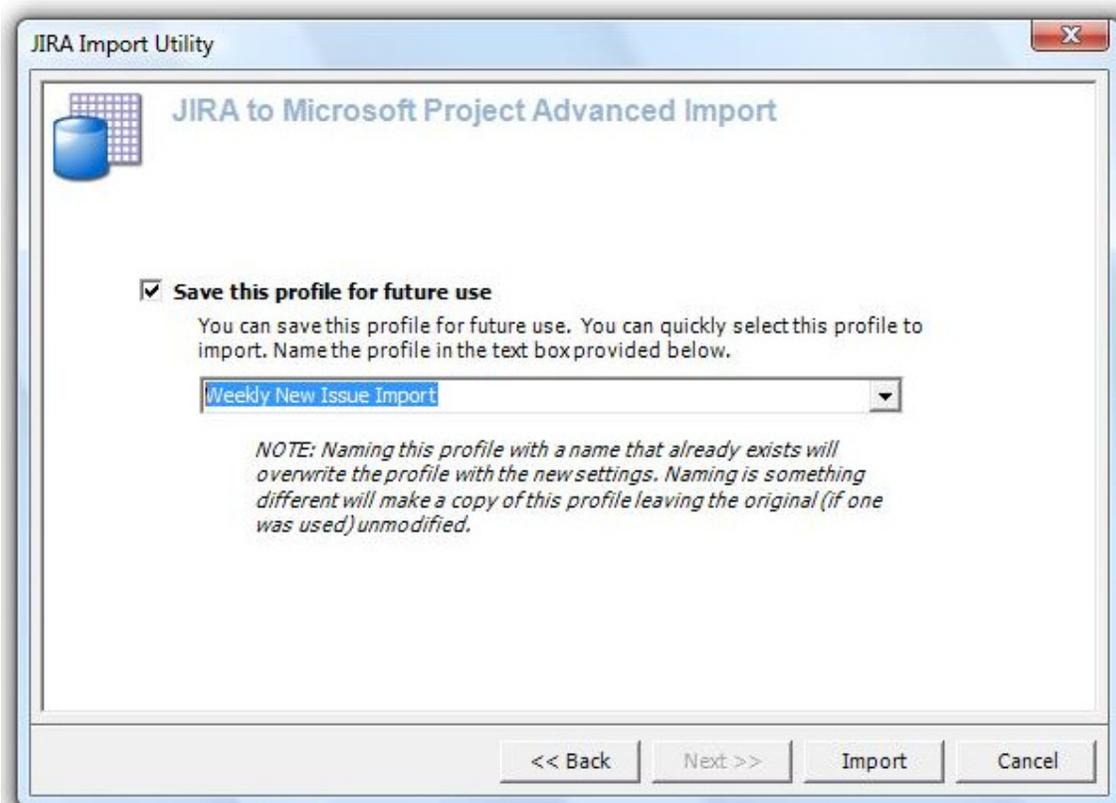
Resource Assignment Filtering

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.

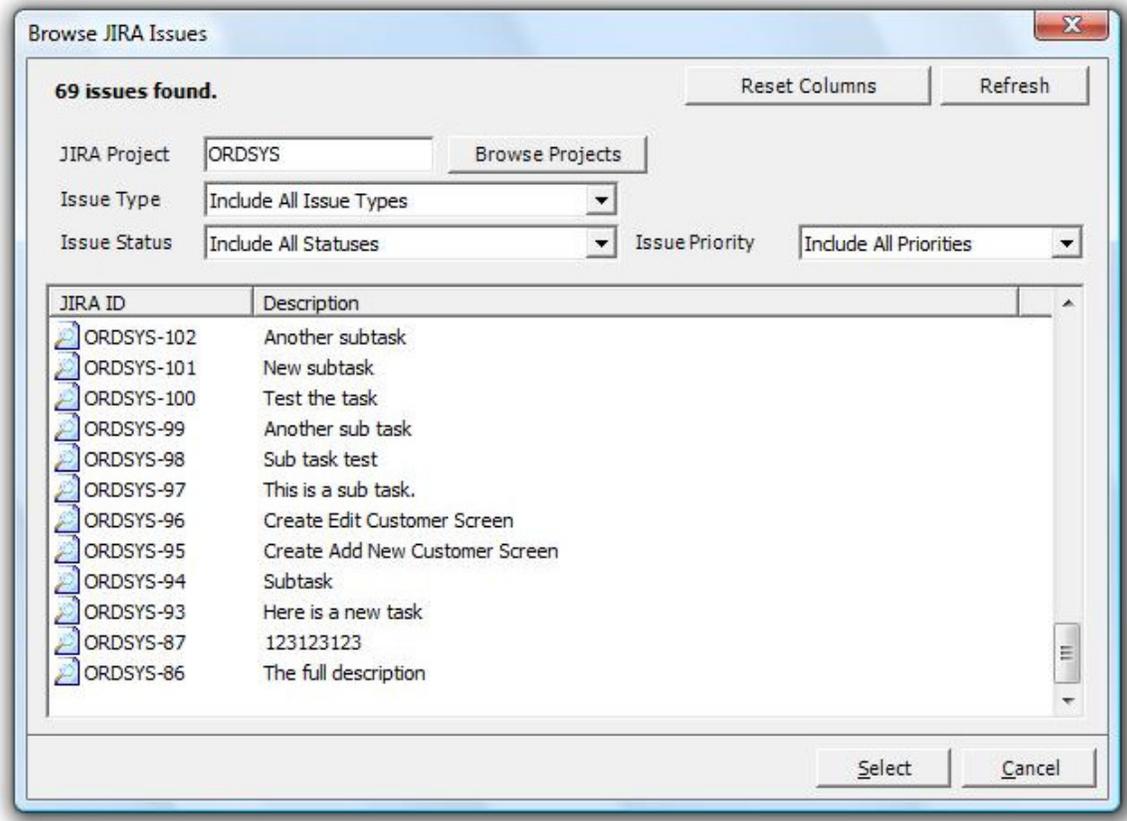


Save this profile for future use

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.



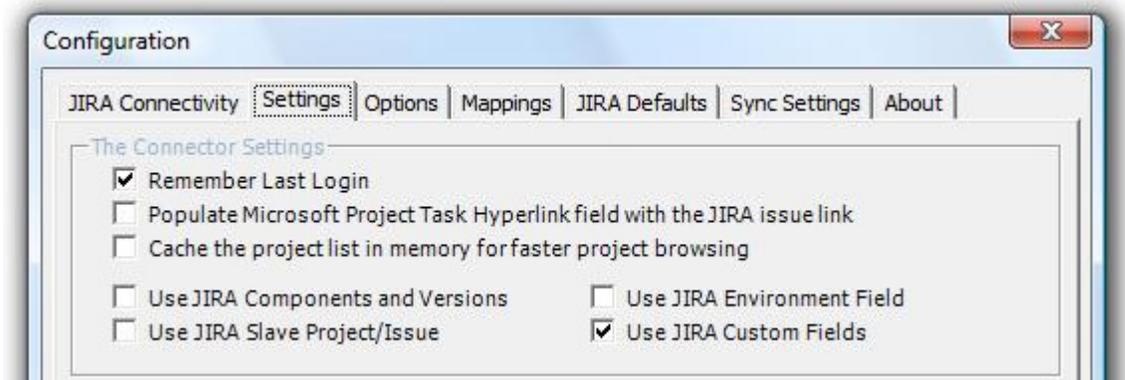
You can use the filter options on this dialog to restrict which issues are showing based on the issue type, status and priority.

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.

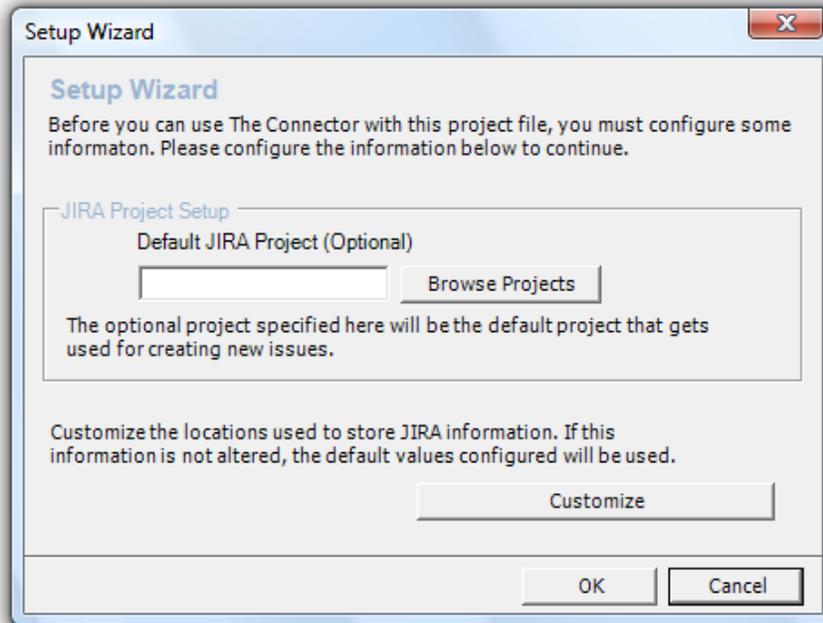


For demonstration purposes, we've created some custom fields in JIRA. Once for a Customer Tracking Number, which we will store some arbitrary value that ties to a customer and a Ready To Update flag which indicates that the fix is ready to be deployed.

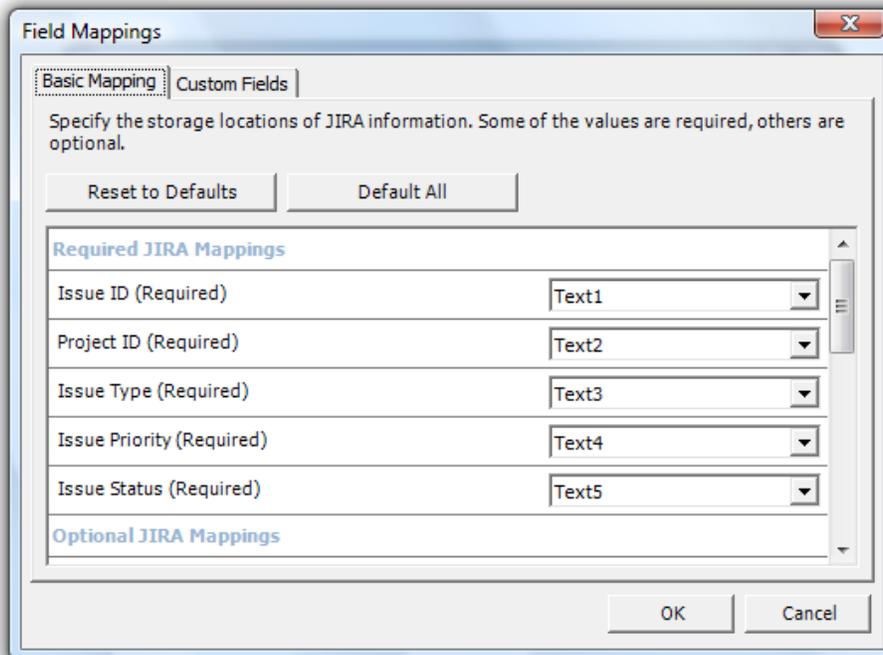
Name	Type	Available Context(s)	Screens	Operations
Additional Comments Here are some additional comments.	Free Text Field (unlimited text)	Issue type(s):	<input type="checkbox"/> Default Screen <input type="checkbox"/> Resolve Issue Screen <input type="checkbox"/> Workflow Screen	Configure Edit Screens Delete
Customer Email Customer's Email Address	Text Field (< 255 characters)	Global (all issues)	<input type="checkbox"/> Default Screen <input type="checkbox"/> Resolve Issue Screen <input type="checkbox"/> Workflow Screen	Configure Edit Screens Delete
Customer Tracking Number Customer Tracking Number	Text Field (< 255 characters)	Global (all issues)	<input type="checkbox"/> Default Screen	Configure Edit Screens Delete
Ready to Update Ready To Update	Select List	Global (all issues)	<input type="checkbox"/> 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)	<input type="checkbox"/> Default Screen <input type="checkbox"/> Resolve Issue Screen <input type="checkbox"/> 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.

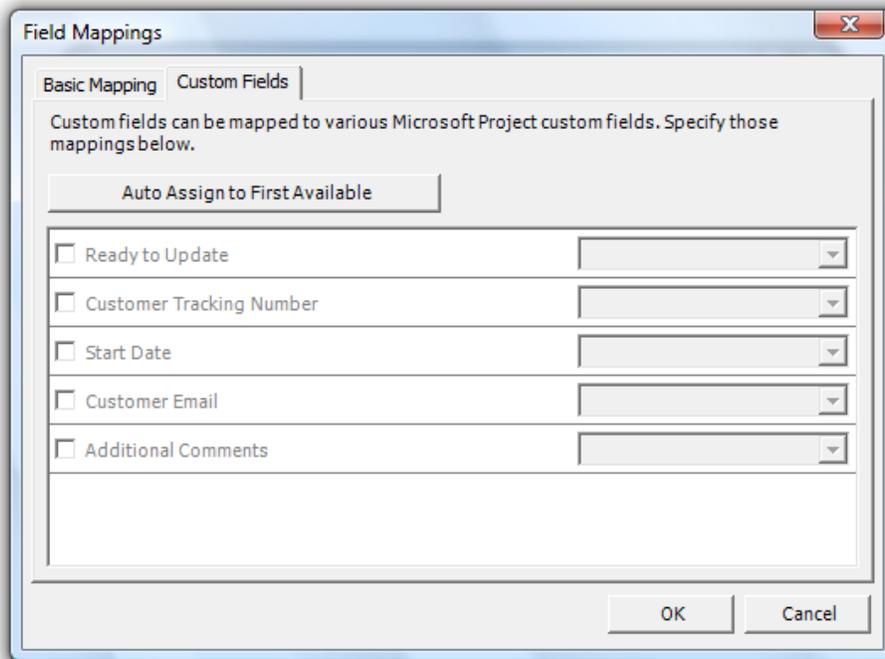
NOTE: Microsoft Project has 30 custom text fields that The Connector uses, but you can mix and match the values you wish to use.



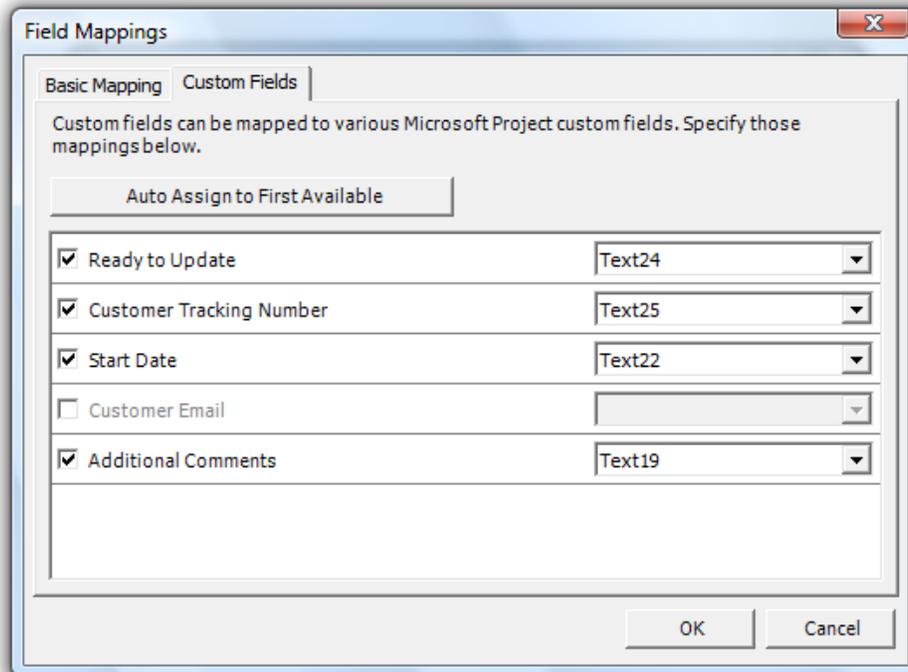
There are 5 mappings that are required but all of the others can be assigned as you wish.



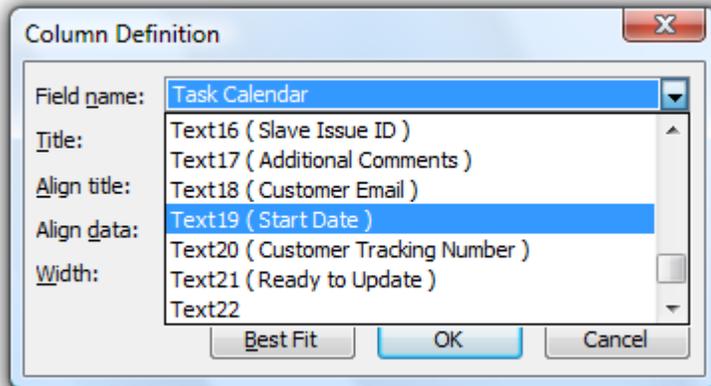
The "Custom Fields" tab of this dialog will allow you to assign the location for the custom fields you wish to exchange.



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



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.



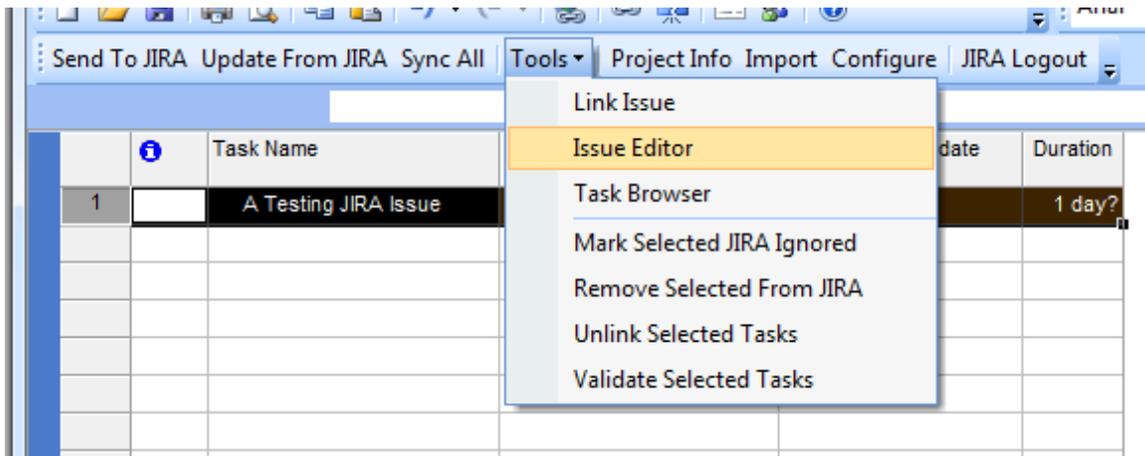
You'll notice that our task list in Microsoft Project has two columns for our custom fields.

	Task Name	Customer Tracking Number	Ready to Update	Duration

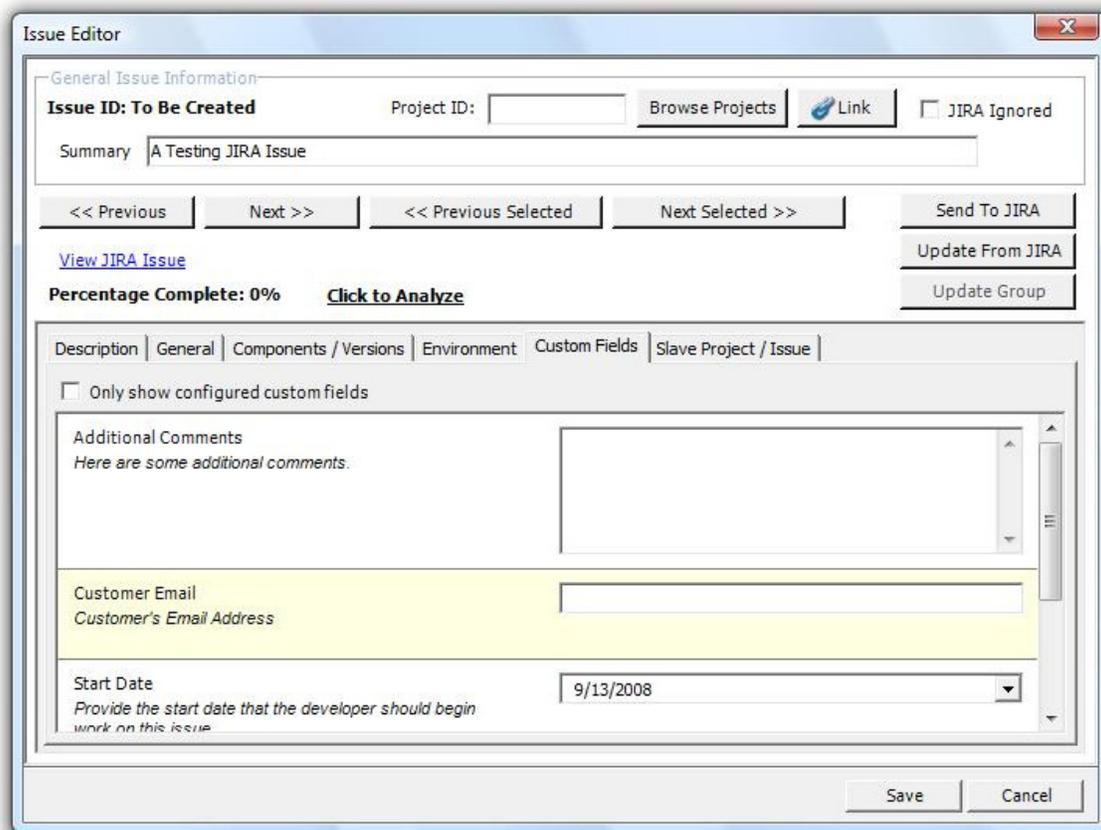
Next, we'll create a task in Microsoft Project and highlight it.

	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.

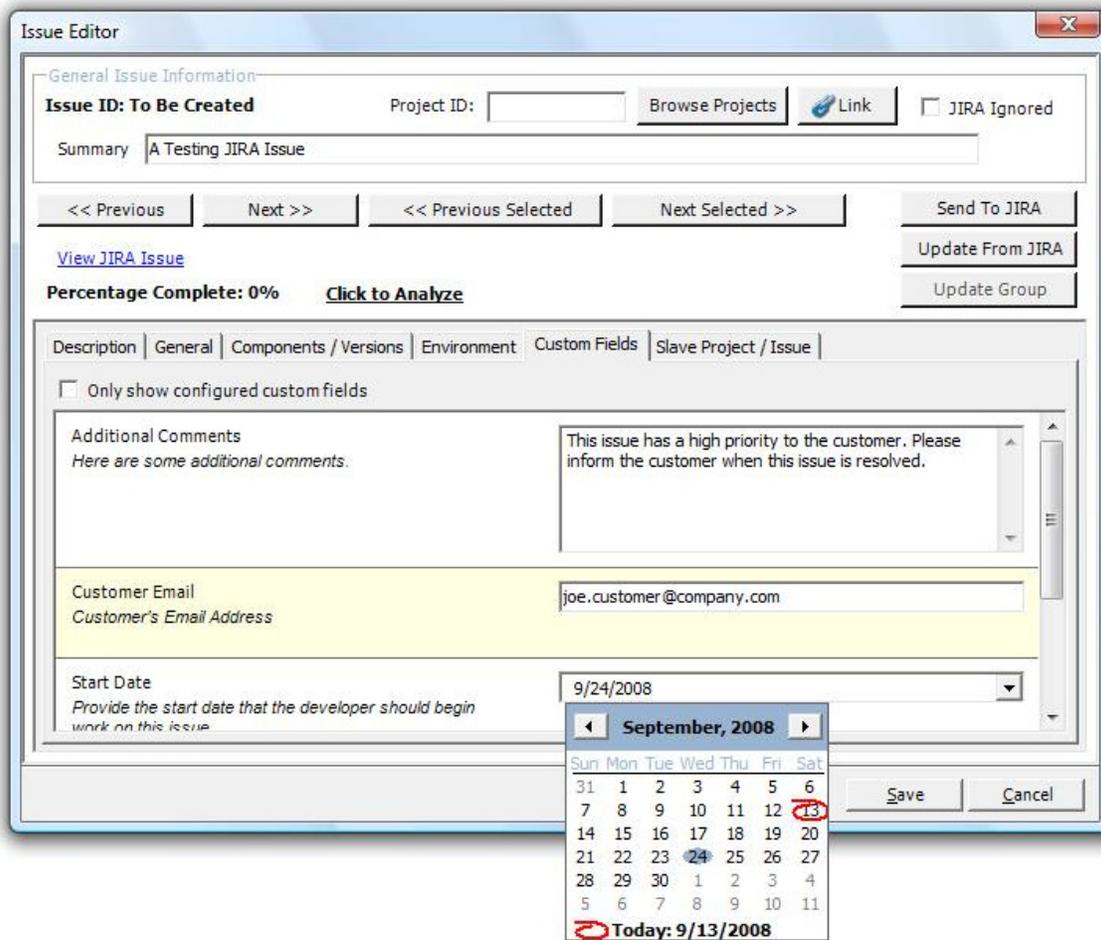


The issue editor has been enhanced in The Connector 1.2 to support some additional functionality. You'll notice the new tab for custom fields.

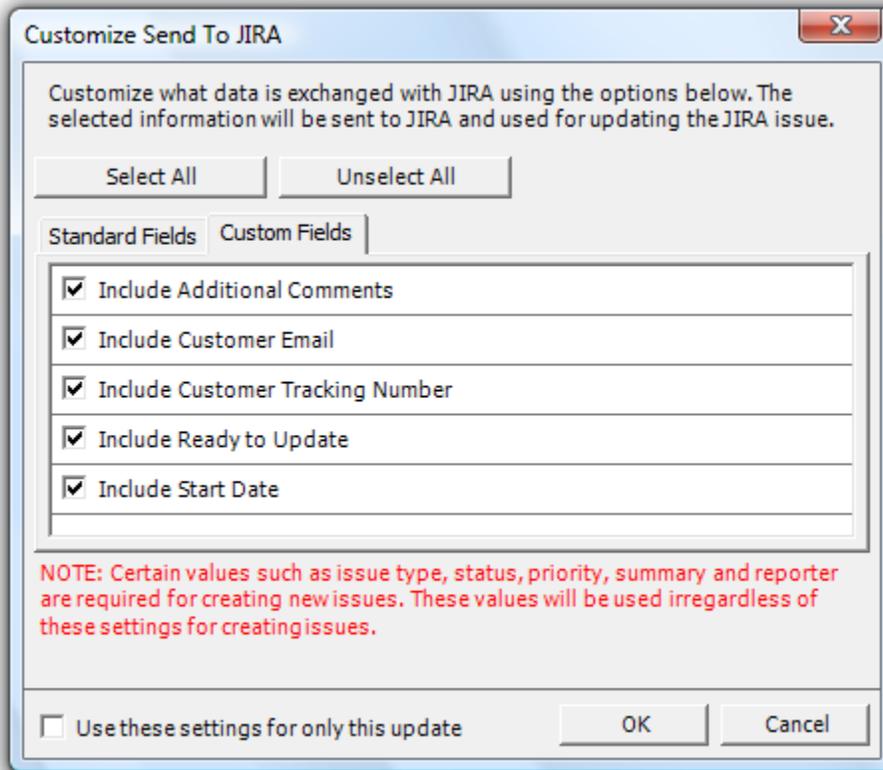


We can make the changes to the custom field from this dialog.

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.



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.



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 has a high priority to the customer. Please inform the customer when this issue is resolved.				
Start Date:	09/24/2008				
Customer Email:	joe.customer@company.com				

[All](#)
[Comments](#)
[Work Log](#)
[Change History](#)
Sort Order:

There are no comments yet 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.

Original Estimate:
 An estimate of how much work remains until this issue will be resolved.
 The format of this is ' *w *d *h *m ' (representing weeks, days, hours and minutes - where * can be any number)
 Examples: 4d, 5h 30m, 80m and 3w.

Ready to Update:
 Ready To Update

Customer Tracking Number:
 Customer Tracking Number

Additional Comments:
 Here are some additional comments.

Start Date:
 Provide the start date that the developer should begin work on this issue.

Customer Email:
 Customer's Email Address

Original Estimate:	1 day	Remaining Estimate:	1 day	Time Spent:	Unknown
Customer Tracking Number:	X9804399				
Additional Comments:	This issue has a high priority to the customer. Please inform the customer when this issue is resolved.				
Start Date:	09/24/2008				
Customer Email:	joe.customer@company.com				

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.

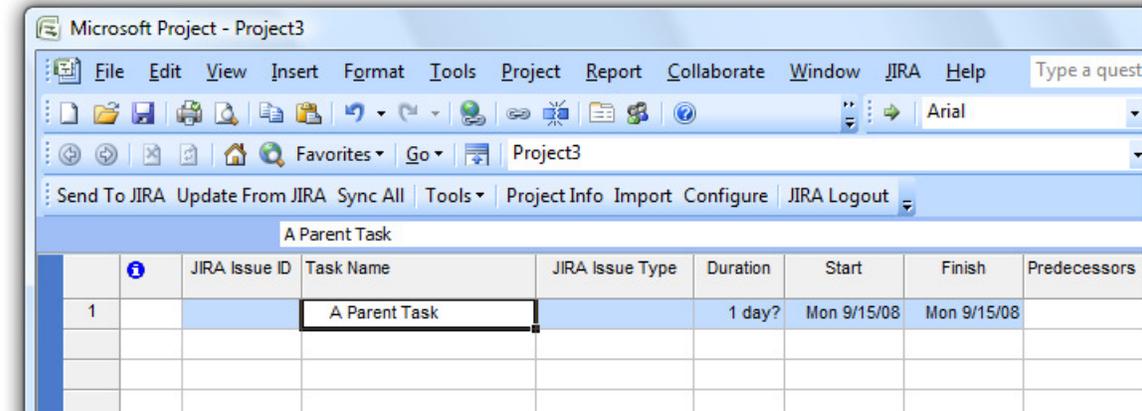
Send To JIRA Update From JIRA Sync All Tools Project Info Import Configure JIRA Logout					
		Task Name	Customer Tracking Number	Ready to Update	Duration
1		A Testing JIRA Issue	X9804399		1 day

Working with Sub Tasks

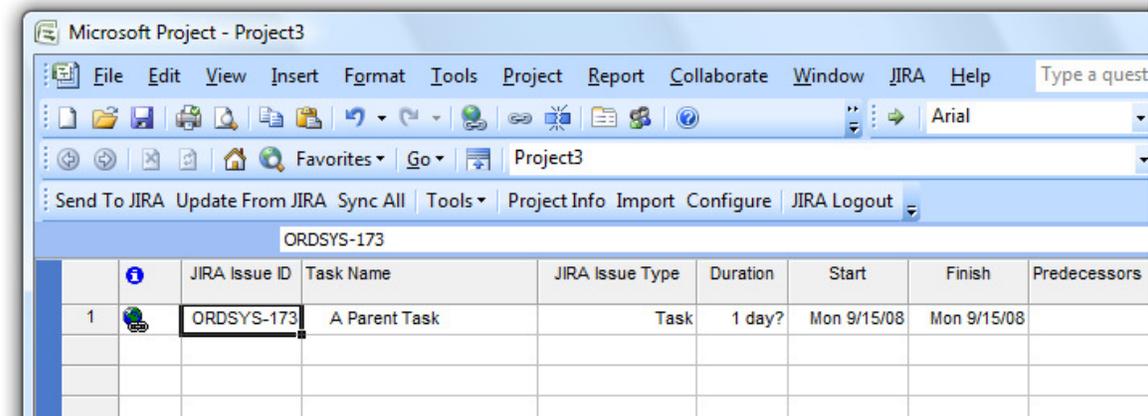
The Connector supports the import and creation of JIRA sub-tasks through Microsoft Project. In Microsoft Project, a sub-task is a task that is indented under its parent.

NOTE: The indention level in Microsoft Project is not a requirement for a JIRA sub-task. 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.



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.



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

Simple Order Management System
↳ **A Parent Task**
Created: Today 11:39 PM Updated: Today 11:39 PM

Component/s: None
Affects Version/s: None
Fix Version/s: None

Original Estimate:	1 day	Remaining Estimate:	Unknown	Time Spent:	Unknown
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[All](#) [Comments](#) [Work Log](#) [Change History](#) Sort Order: ↓

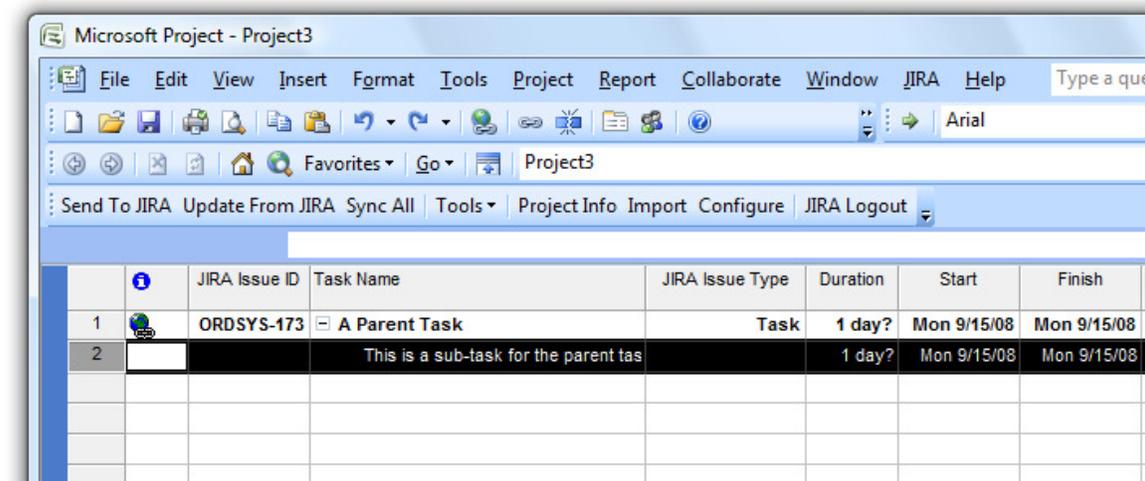
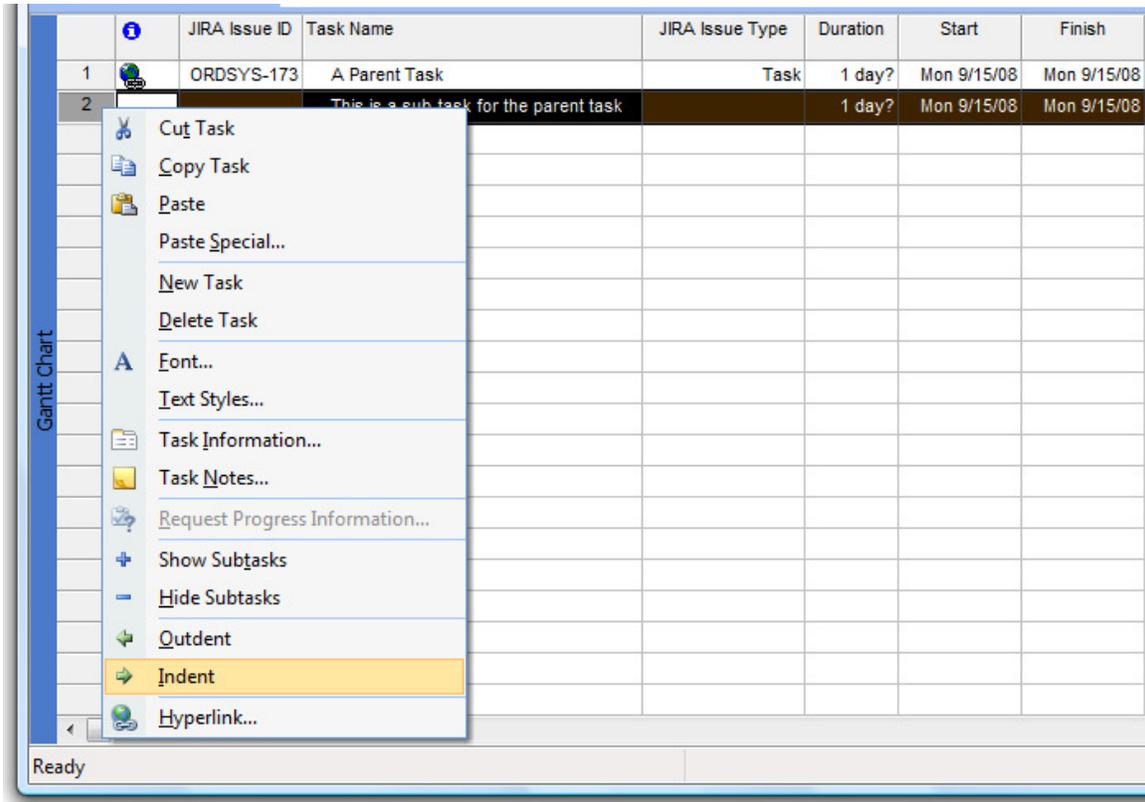
There are no comments yet on this issue.

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

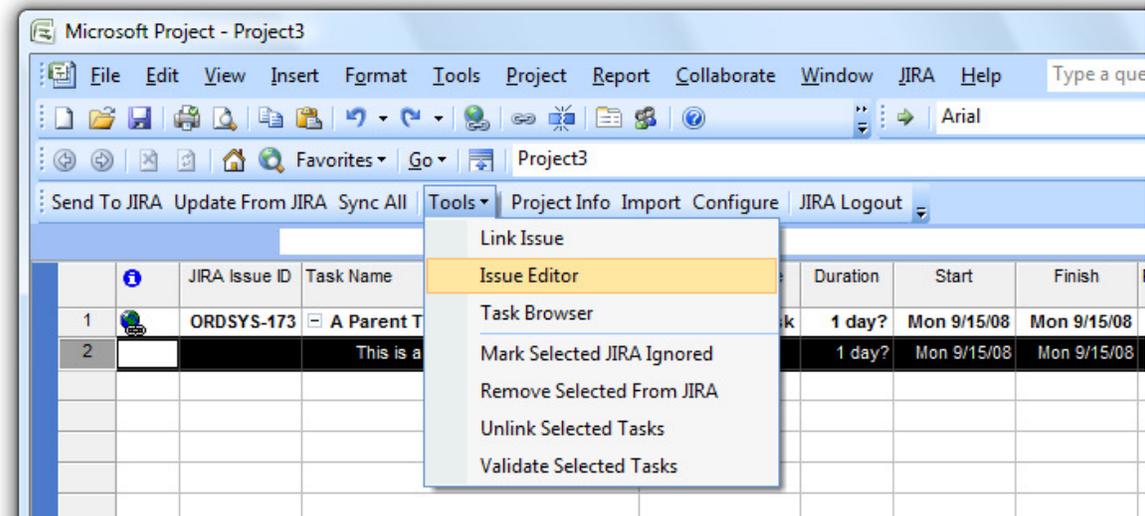
The screenshot shows the Microsoft Project interface for 'Project3'. The task list contains two tasks:

	JIRA Issue ID	Task Name	JIRA Issue Type	Duration	Start	Finish
1	ORDSYS-173	A Parent Task	Task	1 day?	Mon 9/15/08	Mon 9/15/08
2		This is a sub-task for the parent task		1 day?	Mon 9/15/08	Mon 9/15/08

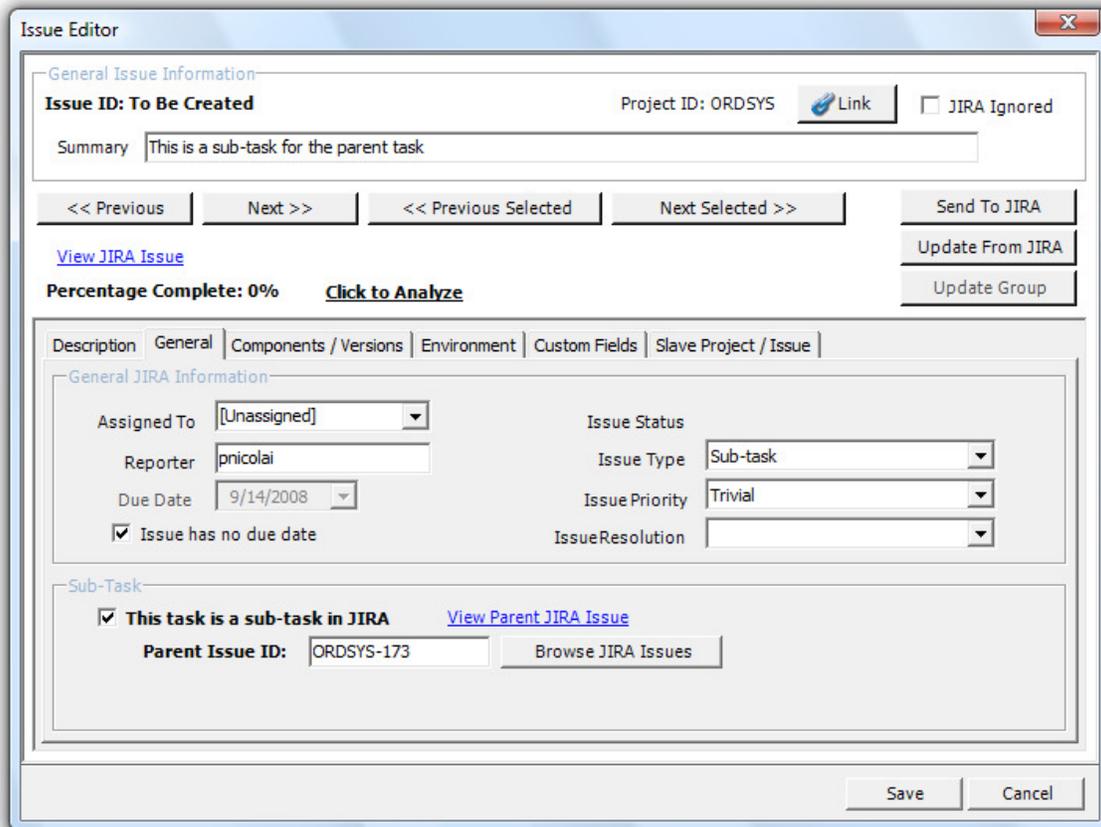
Next we'll highlight the task, right click the task and select the "Indent" option to position the new task under the parent task.



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".



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.



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.

Sub-Task

This task is a sub-task in JIRA [View Parent JIRA Issue](#)

Parent Issue ID:

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

This task is a sub-task in JIRA [View Parent JIRA Issue](#)

Parent Issue ID:

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

ORDSYS-178								
		JIRA Issue ID	Task Name	JIRA Issue Type	Duration	Start	Finish	Predecessors
1		ORDSYS-177	A Parent Task	Bug	1 day?	Mon 9/15/08	Mon 9/15/08	
2		ORDSYS-178	This is a subtask for the Parent Task	Sub-task	1 day?	Mon 9/15/08	Mon 9/15/08	

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

[Simple Order Management System](#)

A Parent Task

Created: Today 11:39 PM Updated: Today 11:39 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](#) Sub-Task Progress:

1. [This is a subtask for the Parent Task](#) Open Unassigned [Resolve Issue](#) | [Close Issue](#)

New:

[All](#) [Comments](#) [Work Log](#) [Change History](#) Sort Order:

There are no comments yet on this issue.

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

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.

Simple Order Management System
A Parent Task
 Created: Today 11:39 PM Updated: Today 11:39 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 Sub-Task Progress:

1. This is a subtask for the Parent Task	Open	Unassigned	Resolve Issue Close Issue
2. A sub task created through JIRA	Open	Unassigned	Resolve Issue Close Issue

New: Sub-task Unassigned Assign to me Add

[All](#) [Comments](#) [Work Log](#) [Change History](#) Sort Order: ↓

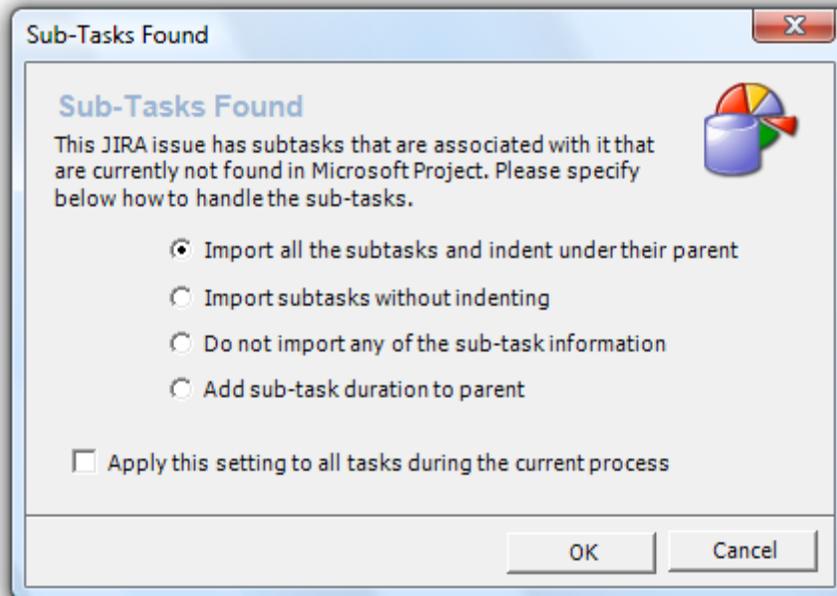
There are no comments yet on this issue.

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

	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-107	This is a subtask for the Parent Task	Sub-task	1 day?	Tue 04/22/08	Tue 04/22/08

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.



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.

	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	ORDSYS-107	This is a subtask for the Parent Task	Sub-task	1 day?	Tue 04/22/08	Tue 04/22/08

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.

	JIRA Issue ID	Task Name	JIRA Issue Type	Duration	Start	Finish	Predecessors
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

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.

	JIRA Issue ID	Task Name	JIRA Issue Type	Duration	Start	Finish	Predecessors
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

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

Simple Order Management System
 ↳ **A Parent Task**
 Created: Yesterday 11:39 PM Updated: Today 12:21 AM

Component/s: None
Affects Version/s: None
Fix Version/s: None

Original Estimate:	1 week	Remaining Estimate:	Unknown	Time Spent:	Unknown
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Sub-Tasks: All Open Sub-Task Progress:

1. This is a subtask for the Parent Task		Open	Unassigned	Resolve Issue Close Issue
2. A sub task created through JIRA		Open	Unassigned	Resolve Issue Close Issue

New: Sub-task Unassigned Assign to me Add

[All](#) [Comments](#) [Work Log](#) [Change History](#) Sort Order: ↓

There are no comments yet on this issue.

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

Simple Order Management System
 ↳ **A Parent Task (ORDSYS-108)**
 ↳ **This is a subtask for the Parent Task**
 Created: Yesterday 11:47 PM Updated: Today 12:21 AM

Component/s: None
Affects Version/s: None
Fix Version/s: None

Original Estimate:	3 days	Remaining Estimate:	Unknown	Time Spent:	Unknown
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[All](#) [Comments](#) [Work Log](#) [Change History](#) Sort Order: ↓

There are no comments yet on this issue.

Simple Order Management System
 ↳ **A Parent Task (ORDSYS-108)**
 ↳ **A sub task created through JIRA**
 Created: Yesterday 11:55 PM Updated: Today 12:21 AM

Component/s: None
Affects Version/s: None
Fix Version/s: None

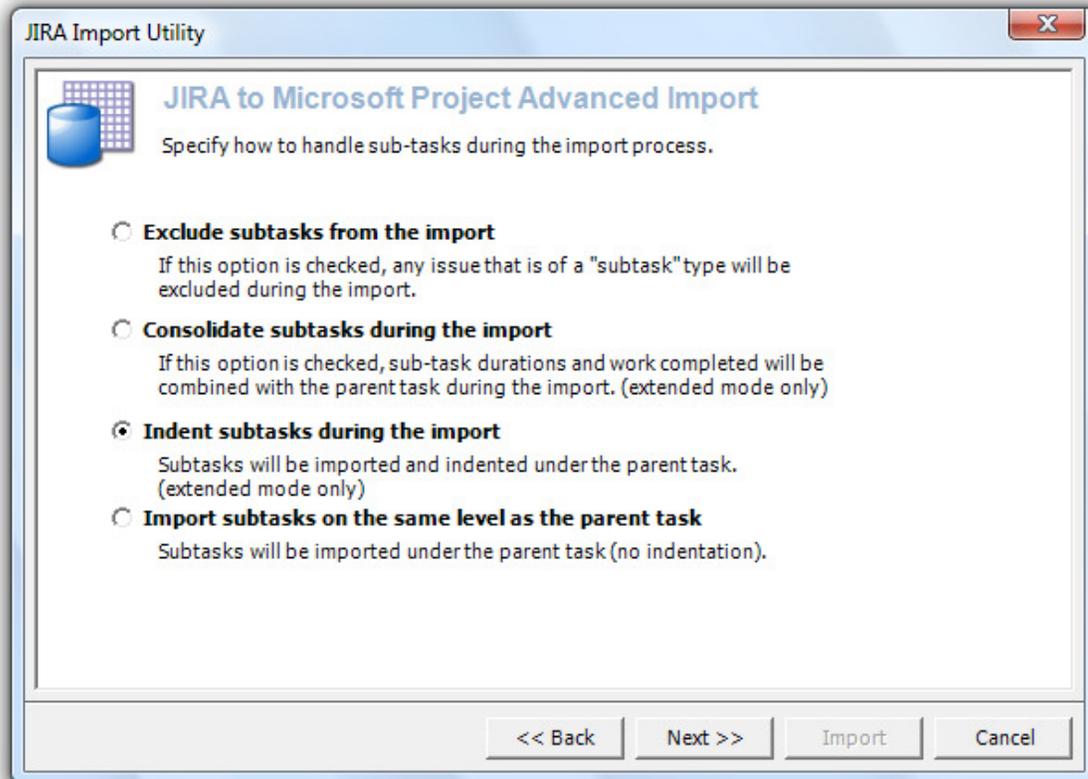
Original Estimate:	2 days	Remaining Estimate:	Unknown	Time Spent:	Unknown
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[All](#) [Comments](#) [Work Log](#) [Change History](#) Sort Order: ↓

There are no comments yet on this issue.

Importing Sub Tasks

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



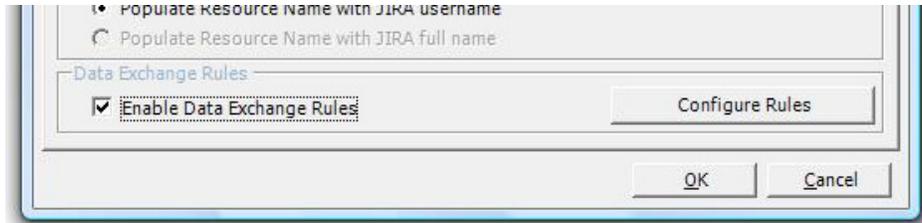
If you choose to indent sub-tasks during the import, they will get included and indented under their parent issue in Microsoft Project.

Data Exchange Rules

Data exchange rules are a new feature added to version 1.3 of The Connector. They allow you to configure different rules for linking issues in Microsoft Project and in JIRA.

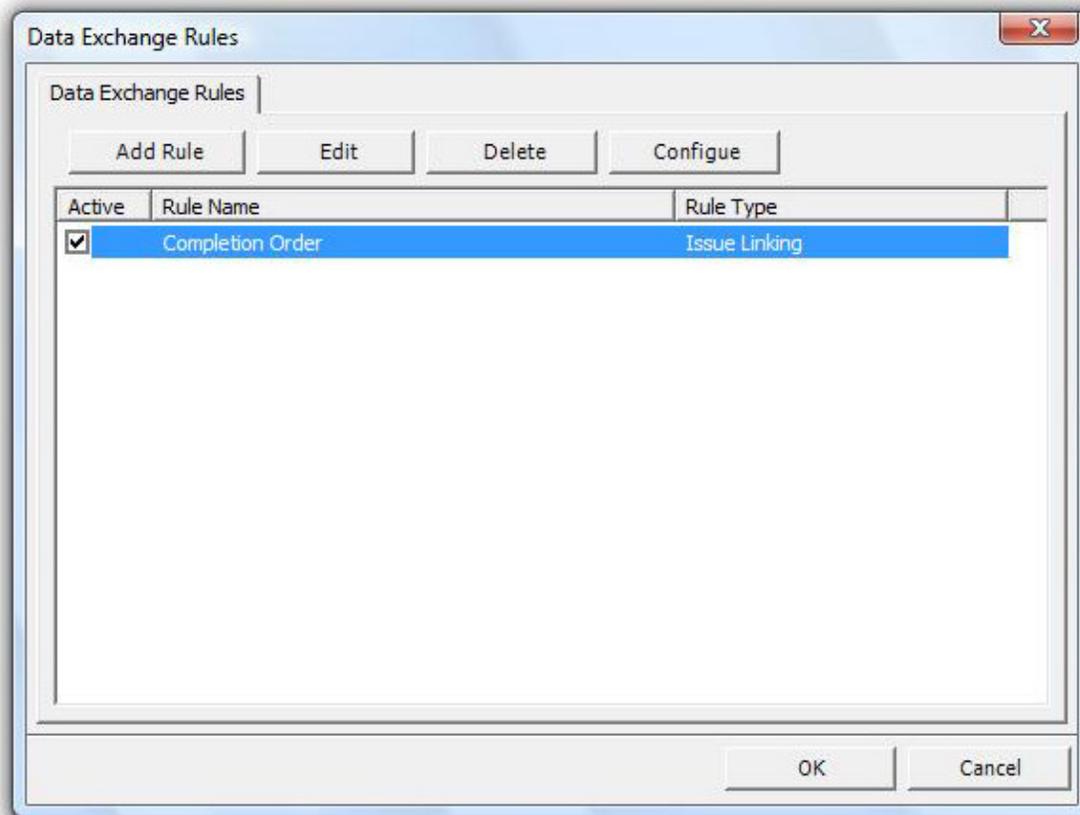
To enable the Data Exchange Rules, click on The Connector configuration dialog and click to the "Settings" tab.

At the bottom of the settings tab is an option to enable the Data Exchange Rules. Check this option and press the "Configure Rules" to setup the exchange rules.



The Data Exchange Rules dialog will show you all of the rules you currently have configured. From this screen you can add a new rule, edit an existing rule or delete an existing rule.

By toggling the checkbox next to the rule, you can enable/disable the active status of the rule. This will allow you to leave a rule configured but temporarily disable it when needed.



Creating a Rule

To create a new Data Exchange Rule, click the "Add Rule" button on the dialog box. This will open a window where you can specify the type of data exchange rule to use.

There are current two types of rule to pick from.

Issue Linking

This issue linking rule allows you to map Microsoft Project predecessor or successor fields when a specify type of JIRA issue link is encountered.

Example: You want your Microsoft Project plan to automatically create a dependency link if it detects that JIRA has an issue link of "depends on".

Issue Exclusion

This issue exclusion rule allows you to exclude a type of issue if the specified link is encountered.

Example: When performing planning, any issue that is a "duplicate" of another issue should not get scheduled since scheduling it would cause a doubling of effort. You can configure the rule to exclude any JIRA issues that are flagged as duplicates of another.

The image shows a dialog box titled "Edit Rule". It has a standard Windows-style title bar with a close button (X) in the top right corner. The dialog is divided into three main sections:

- Rule Name:** A text input field with the prompt "Provide a name for this rule".
- Apply Rule During:** A section containing three checked checkboxes:
 - Send To JIRA
 - Update From JIRA
 - Import from JIRA
- Rule Type:** A dropdown menu with the prompt "Select the type of rule to define".

At the bottom of the dialog, there are three buttons: "<< Back", "Next >>", and "Cancel".

You can specify during which actions you wish to have the rule executed during. This allows you to create a rule that is only applied during the "Send To JIRA" function. Doing so would not run the rule when "Update From JIRA" is performed.

You can provide any meaningful name for the rule that you wish by entering a value in the "Rule Name" box.

Excluding "duplicate" issues

The screenshot shows a configuration window with three sections:

- Rule Name:** A text box containing "Exclude Duplicates".
- Apply Rule During:** Three checkboxes: "Send To JIRA" (unchecked), "Update From JIRA" (checked), and "Import from JIRA" (checked).
- Rule Type:** A dropdown menu with "Issue Exclusion" selected.

Since we would only worry about excluding duplicates if we are bring data from JIRA to Microsoft Project, we would only check the Apply Rule During options to "Update From JIRA" and "Import From JIRA".

The screenshot shows a configuration window titled "Update/Import From JIRA" with a section for "JIRA Link Type".

Exclude the issue if the issue has an outbound link of type:

- Dropdown menu with "Duplicate" selected.
- List of link types: "Completion Order", "Depends", "Duplicate", "Replaces".

The Connector then queries JIRA for all available issue types and give you a list of those types to choose from. In this instance we would choose the "Duplicate" type.

Create a Data Exchange Rule for a dependency allows you to specify how you want the dependency to link in Microsoft Project. The Connector supports the four types of linking of Microsoft Project.

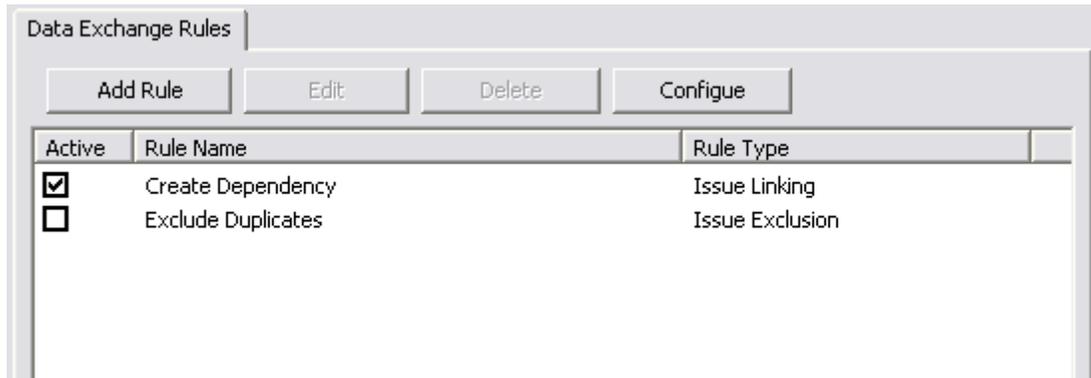
- Finish-to-Start
- Start-to-Start
- Finish-to-Finish
- Start-to-Finish

You can also specify whether to store the linking using the predecessor field of the successor field.

The screenshot shows a dialog box titled "Update/Import From JIRA" with a "Send To JIRA" button. It is divided into three sections:

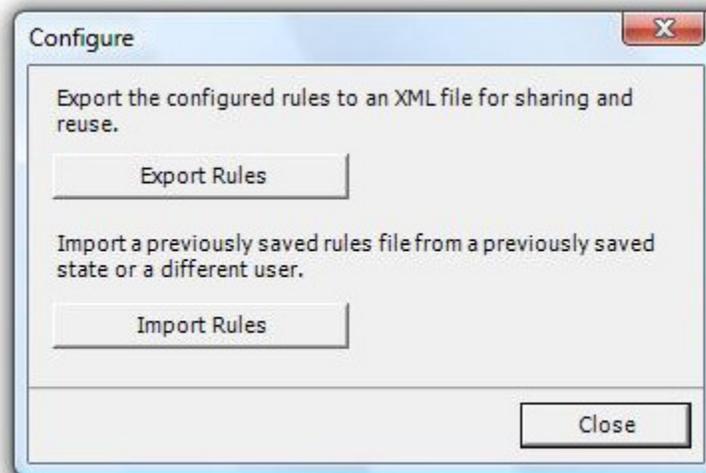
- JIRA Link Type:** A section with the label "If the issue has an outbound link of type:" and a dropdown menu currently set to "Depends".
- Action:** A section with two radio button options: "Make the linked issue a predecessor" (which is selected) and "Make the linked issue a successor".
- Project Link Type:** A section with the label "Create Project links of type:" and a dropdown menu. The menu is open, showing four options: "Finish-to-Start (FS)", "Start-to-Start (SS)", "Finish-to-Finish (FF)", and "Start-to-Finish (SF)".

The Data Exchange Rules configuration dialog allows you to enable/disable the rules you wish to apply. This allows you to create several rules and activate/deactivate them for use without having to delete and recreate them each time.



Using the "Configure" button will allow you to import and export rules. This is helpful for sharing configured rules with different users. Pressing the "Export" button will give you a Microsoft Windows "Save As" dialog box where you can specify a location to save the file.

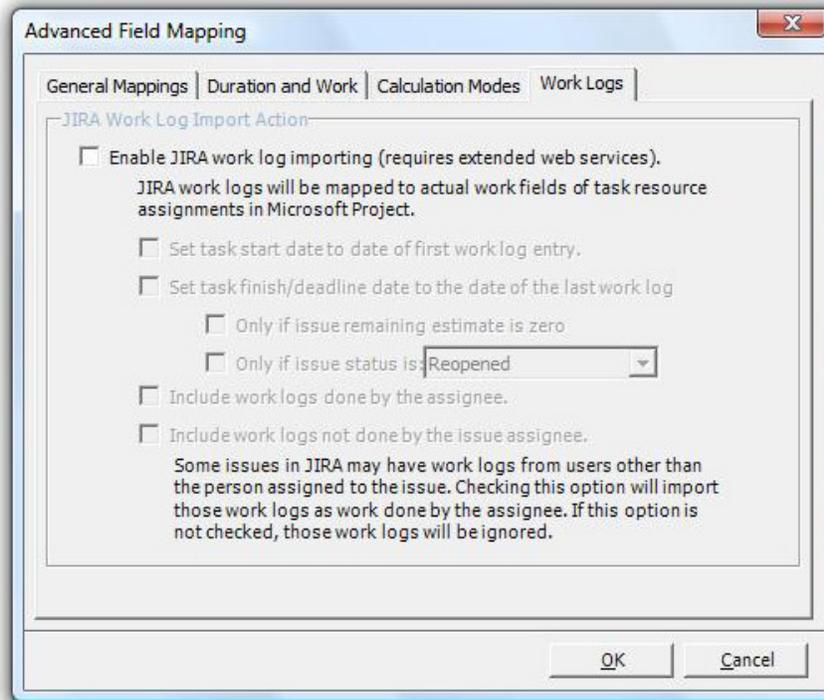
The rules are stored in an XML file that another user can import using the "Import Rules" option.



Worklog Import

The new worklog import feature of The Connector allows you to import worklog data into Microsoft Project and break the effort time by user and by task.

To enable this functionality, go to The Connector configuration dialog, press the "Advanced Field Mapping" button and click on the "Work Logs" tab.



There are several options available to controlling how the worklog data gets imported.

To enable the functionality, select the "Enable JIRA work log importing" option. Note that this functionality will require the installation of The Connector extended web services. This plugin is available for download from the website at www.the-connector.com

Set task start date to date of first work log entry

This option will set the start date of the task to the date of the earliest work log that is imported.

Set task finish date/deadline date to the date of last work log

This option will set the finish date / deadline date (depending on your configuration) to the date of the last work log entry.

Only if issue remaining estimate is zero

If you have the option to set the finish date / deadline date to the date of the last work log, you also have the option to only set this value if the remaining estimate is zero. The typical use for this is to only set this value if all of the estimated work on the issue is completed, meaning the task is actually finished. If remaining work is needed, it may not be desirable to have the Finish Date of the task set as this would not be the true finish date.

Only if issue status is:

This option allows you to conditional set the finish date / deadline date to the last work log if the issue matches a specified status. This allows you to configure this process to look at "Closed" issues, meaning the work is actually completed and the finish date should get set to this value.

Include work logs done by the assignee

This option allows you to conditionally import work logs that have been created by the assignee of the issue.

Include work logs not done by the issue assignee

This option allows you to conditionally import work logs that have been created by users other than the assignee of the issue.

Summary

Helpful Links

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