The Connector

Version 1.3

Microsoft Project to Atlassian JIRA Connectivity

User Manual

Ecliptic Technologies, Inc. Copyright 2009

www.the-connector.com

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Introduction

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

System Requirements

The Connector requires:

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

Optional requirements for the extended functionality:

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

Installation

Plug-in Installation

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

The Connector Extended Web Service Installation

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

NOTE: You must have Atlassian JIRA 3.6 or greater

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

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

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

3) Enable the RPC extensions in JIRA

4) Restart JIRA

Enabling JIRA Web Services

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

Logout commutation	HOVE
Use gzip compression	OFF
Accept remote API calls	ON
User email visibility	Public
Comment visibility	Droject Roles only

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

	stalled Diverse	_		
	nstalled Plugins	Т	he Connector for Microsoft Project	
	Admin Menu Sections 66 modules.	De Ve	escription: Microsoft Project to JIRA Integration	
	Custom Field Types & Searchers 36 modules.	PI	ugin Versions: 1.3 RA Versions: 3.6 - 3.13	
	RPC JIRA Plugin		Disable plugin	
	14 modules.		COAD Convision for The Connector (the connector)	Dischla madula
	Web Resources Plugin		SOAP Services for The Connector (ineconnector)	Disable module
	Issue Operations Plugin 18 modules.		The Connector for Microsoft Project (rpc-theconnector) RPC - Extended web services for enhanced functionality with The Connector for Microsoft Project.	Disable module
12	he Connector for Microsoft Project modules.			
	Workflow Plugin 20 modules.			

Registration

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

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

Overview

The JIRA Connector Toolbar

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

nd T	o JI	RA Upo	late Fr	om JIRA	A Syr	ic All	Too	ls • P	roject Ir	nfo	Imp	ort	Cor	nfig	ure	JI	RAL	og	out	
Micr	rosoft	Project - Pr	oject1															0		Σ
E 🄄	ile <u>E</u>	dit <u>V</u> iew	Insert	F <u>o</u> rmat	Tools	Project	Report	Collabor	ate <u>W</u> ind	ow	JIRA	<u>H</u> elp		Гуре а	que	stion f	or helj	p	-	8
	3 🖬		Ga 😤	17 - (1	- 8	ee 💥	1 🗈 💰	0		28	⇒	Arial				- 8	-	в	ΙĽ	J
Send	To JIR/	Update Fi	rom JIRA	Sync All	Tools -	Project	Info Imp	ort Config	ure JIRA L	ogou	it _									
																			_	
		1		1	Duration	Sta	rt	Finish	, '08		Aug 1	0, '08		Au	q 17,	'08		Auc	24. '0	08

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

Send to JIRA - Push task information to JIRA issues

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

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

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

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

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

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

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

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

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

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

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

Configure - View and modify configuration information for The Connector

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

The JIRA Menu

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



Logging Into JIRA / Logging Out of JIRA

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

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

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

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



Trial Version

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

he Connector		X
The Connect	or - Trial Vers	ion
This is a trial versi	on of The Connect	or for Microsoft Project.
This trial version	will function for	30 days for evaluation.
To activate your ve below and enter ye	ersion of this softw our product key.	vare, press the Register button
To learn how to pu our website.	irchase this produc	t, simple click on the link to visit
http://www.the-co	onnector.com	
	Register	Continue with Trial

Once you purchase your copy of The Connector, you will receive a product registration key that can be entered into the 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.

Setup Wizard	
Before you can use The Conne informaton. Please configure t	ctor with this project file, you must configure some the information below to continue.
JIRA Project Setup	
Default JIRA Project	(Optional)
	Browse Projects
The optional project specific	ed here will be the default project that gets
used for creating new issue.	3.
Customize the locations used information is not altered, the	to store JIRA information. If this default values configured will be used. Customize
Customize the locations used information is not altered, the	to store JIRA information. If this default values configured will be used. Customize

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

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

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

RA	Browse JIRA Projec	ts			
	3 projects found	l.	F	Reset Columns	Refrest
	JIRA ID	Description			
sto orm	ORDSYS	Simple Order Management Simple Order Management	System System Testing		

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

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

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

Configuration

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

JIRA Connectivity

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

JIRA Address	http://192.168.1.1	150:8080 d Configuration	1	i
Provide the URL http://jira.mycor	to the JIRA web se npany.com or http:	rvices. Examples: //10.34.1.200		
JIRA Communic	ition Settings			
Use custo	m date format map	ping		
□ Use optim	ized issue and proje	ect browsing		
✓ Use exten	ded web services	Click here for n	nore details	
Extended web will allow for d	services require the uration, timespent	installation of the J and percentage com	IRA plugin. Enabli plete data to be e	ng this option xchanged.

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

Advanced Configuration

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

Proxy Server HTTP Authentication		Proxy Server HTTP Authentication
Proxy Server Settings]	Authentication
Connect to JIRA through a proxy se	erver	☐ JIRA server requires HTTP authentication
Address	Port	Username
		Password
Proxy Authentication		
Proxy server requires authentication	n	The JIRA server you are connecting to requires that you using
	-	basic HTTP authentication. Provide a username and password
Username		ilere.
Username Password	-	nere.
Username Password		
Username Password		

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

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

JIRA Communication Settings

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

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

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

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

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

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

Settings

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

RA Connectivity Settings Options Mappings	JIRA Defaults Sync Settings About
The Connector Settings	
Remember Last Login	
Populate Microsoft Project Task Hyperli	nk field with the JIRA issue link
Cache the project list in memory for fast	er project browsing
✓ Use JIRA Components and Versions	Use JIRA Environment Field
✓ Use JIRA Slave Project/Issue	Use JIRA Custom Fields
Perource Manningo	
Map Resource Name to 1IRA username	
C Map Windows User Account field to 11R/	Ausername
C Map custom text field to JIRA username	Text1
When Automatically Creation Decourses	
C Never create a resource entry automatic	ally
Revel create a resource entry automatic Populate Resource Name with 11PA user	any name
C Deputate Resource Name with JIDA full.	
Fopulate Resource Manie With StRA Tull 1	iaire
Data Exchange Rules	
Enable Data Exchange Rules	Configure Rules

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

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

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

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

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

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

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

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

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

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

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

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

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

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

1) Never create a resource entry automatically

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

2) Populate Resource Name with JIRA username

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

3) Populate Resource Name with JIRA full name

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

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

Options

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

JIRA Connectivity Settings Options Mappings JIRA De	efaults Sync Settings About	
-Default JIRA Mappings		
Configure the default customf ield mappings that The project sheet is initialized. These settings control where JIRA data is stored.	Connector will use each time a new e in the Microsoft Project file, specific	
☑ Use Microsoft Project Enterprise Text Fields	Configure	
-Advanced Field Mappings		
The advanced field mapping option	Setup Advanced Field Mappings	
allows you to control where values are stored in Microsoft Project.		
-Time Unit Mappings		
Time unit mappings allow you to control	Configure Time Unit Mappings	
the value of Month, Day, Week in non- English versions of Microsoft Project.		
-Import Profile Sharing		
✓ Enable Import Profile Sharing	Configure Directory	
	1	

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

Specify the storage locations optional.	l of JIRA information. So	me of the values are rea	quired, others are
Reset to Defaults	Default All		
Required JIRA Mappings			-
Issue ID (Required)		Text1	
Project ID (Required)		Text2	<u> </u>
Issue Type (Required)		Text3	•
Issue Priority (Required)		Text4	•
Issue Status (Required)		Text5	•
Optional JIRA Mappings			

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

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

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

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.

Specify the storage locations	of JIRA information. So	me of the values are require	d, others are
Reset to Defaults	Default All		
Required JIRA Mappings			*
Issue ID (Required)		Text1	•
Project ID (Required)		Text27 Text28 Text20	
Issue Type (Required)		Text30	
Issue Priority (Required)		EnterpriseText2 EnterpriseText3	
Issue Status (Required)		EnterpriseText4	
Optional JIRA Mappings			
issue Status (Required) Optional JIRA Mappings		EnterpriseText3	Ť

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.

eneral Mappings	Duration and Work Calculation Modes Work Logs
Configure which p specific JIRA info	places information is updated in Microsoft Project with the rmation
	Map the JIRA due date to Task Deadline 💌
-Additional Mapp	ing Options
Exclude par	ent task duration and work information when sending to JIRA
🔲 Do not map	JIRA issue assignment on parent issues
🔲 Update Act	ual Work/Duration to the JIRA Time Spent
This val this opt	ue is usually calculated by JIRA during worklog entry. Enabling ion will overwrite that value when sending data to JIRA.
🔲 Do not upd	ate original estimate if the issue has Time Spent
When s issue ha	ending to JIRA, do not overwrite the JIRA original estimate if the is some work log to it.
	OK Cancel

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.

djusting the Duration and Work values will control where to store the issue stimate and work log times. Map the JIRA estimate value to Task Work Task Work Task Actual Work Task Actual Work Task Actual Work Task Actual Work Task Remaining Work When used to original estimate to original estimate when creating new issues When updating a task already created in JIRA, if there is no current When updating a task already created in JIRA, if there is no current When updating a task already created in JIRA with the provide Work Work Work Work Work Work Work Work	eneral Mappings Duration and Work Calculation Mo	des Work Logs
djusting the Duration and Work values will control where to store the issue stimate and work log times. Map the JIRA estimate value to Task Work Map the JIRA time spent value to Task Actual Work Map the JIRA remaining estimate value to Task Remaining Work Map the JIRA remaining estimate to original estimate when creating new issues When issues are created in JIRA using The Connector, the duration/work value of the task will be set to both the original estimate and the remaining estimate. Set JIRA remaining estimate to original estimate if no time spent When updating a task already created in JIRA, if there is no current	Duration and Work Field Mappings	
Map the JIRA estimate value to Task Work Map the JIRA time spent value to Task Actual Work Map the JIRA remaining estimate value to Task Remaining Work apping Behaviors Set JIRA remaining estimate to original estimate when creating new issues When issues are created in JIRA using The Connector, the duration/work value of the task will be set to both the original estimate and the remaining estimate. Set JIRA remaining estimate to original estimate if no time spent When updating a task already created in JIRA, if there is no current	Adjusting the Duration and Work values will contro estimate and work log times.	ol where to store the issue
Map the JIRA time spent value to Task Actual Work Map the JIRA remaining estimate value to Task Remaining Work apping Behaviors Set JIRA remaining estimate to original estimate when creating new issues When issues are created in JIRA using The Connector, the duration/work value of the task will be set to both the original estimate and the remaining estimate. Set JIRA remaining estimate to original estimate if no time spent When updating a task already created in JIRA, if there is no current	Map the JIRA estimate value to	Task Work 💌
 Map the JIRA remaining estimate value to Task Remaining Work apping Behaviors Set JIRA remaining estimate to original estimate when creating new issues When issues are created in JIRA using The Connector, the duration/work value of the task will be set to both the original estimate and the remaining estimate. Set JIRA remaining estimate to original estimate if no time spent When updating a task already created in JIRA, if there is no current 	Map the JIRA time spent value to	Task Actual Work 🔹
 apping Behaviors Set JIRA remaining estimate to original estimate when creating new issues When issues are created in JIRA using The Connector, the duration/work value of the task will be set to both the original estimate and the remaining estimate. Set JIRA remaining estimate to original estimate if no time spent When updating a task already created in JIRA, if there is no current 	Map the JIRA remaining estimate value to	Task Remaining Work 💌
timespent, the remaining estimate will be updated with the original estimate value.	MappingBehaviors	te when creating new issues

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.

Seneral Mappings Duration and Work Calcula	ation Modes Work Logs
The calculation mode of The Connector will a Microsoft Project task and calculated and inf	allow control over how the values of a erpreted from JIRA.
-Task Duration Calcuation Mode	
• Use basic calculation	
Duration/Work is updated with JIRA C	Original Estimate
O Use adjusted calculation	
Duration/Work is updated with JIRA F	Remaining Estimate + Time Spent
C Use remaining estimate if present	
Duration/Work is updated with the JI value. Otherwise the Original Estimate	RA Remaining Estimate if it has a e is used.
	1

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).

	inte onic Mappi	ig	the strates with a	600	specific
Use Mi	Time Unit mappin Connector to rep	ng allows you to resent minutes, Englishversion	o map the value hours and days	s used by The to values that	
dvanced F	can support non-	Lingiisii version:	s of Microsoft Pl	oject.	
he advanc	-Time Unite				Mappings
llows you	HINE UNITE				
tored in M	Minutes	m			
		I			
ime Unit N	Hours	In			
īme unit m	Davs	d			Mappings
he value o	2.070	1-			
inglish ver	-				
			1	1.	
			OK	Cancel	

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.

b	Import Profile Sharing be accessed by other users to re-use and sh	g will allow your saved i users. This allows a tea nare commonly used im	mport profiles am or group of port profiles.
ecify	file path to shared directo	iry	
Path			
18.22			
			Browse
The pa isers	ath should be a shared di will have access to.	rectory or network driv	Browse at hat all

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.

RA Connectivity Settings Opt	ions Mappings JIRA Defaults Sync Settings About
Mappings for JIRA Issue Sta The JIRA mappings will map a f a JIRA status. Customize the se	a tuses Microsoft Project percentage compl <i>e</i> te to ettings as desired from this screen.
In Progress	50 🕂 %
Open	0 🕂 %
Closed	100 🕂 %
Resolved	95 🛨 %
Reopened	50 ÷ %
Map percent complete if	f greater the mapping above is greater than the use the mapping percent.
xtended worklog calculation, i	

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.

A Connectivity Settings Options	Mappings JIRA Default	Sync Settings About
Jefault JIRA Values	and the second second	
Specify the default values that will	l get used to create new	JIRA Issues.
	. G. Thelesk ups the de	fault value balan
warn and require manual entry	y (• II Dialik, use the de	adult value below
Default Issue Type	Improvement	•
Default Issue Priority	Blocker	
Default Issue Chatur		
Default Issue Status	Open	
Default Subtask Type	Sub-task	<u> </u>

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

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

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

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

About

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

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

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

Copyright 20 ALL RIGHTS F	The Connector 1.2 for JIRA
ttp://www.th	Ecliptic Technologies JIRA Web Service Extensions v1.2

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.

<u> </u>	le <u>E</u> di	t <u>V</u> iew <u>I</u> nsert	Format Tool	s <u>P</u> roject <u>R</u> eport <u>C</u> ollabora	te <u>W</u> indow	IRA <u>H</u> elp	Тур
		🛱 🗋 i 🖻 🛍 i	12) = (21 =	s 👳 🂥 🖹 🕵 🙆	1	<mark>≽ ⇒ <u>S</u>how</mark> ▼	Arial
end 1	To JIRA	Update From JIRA	Sync All Tools	• Project Info Import Configu	re JIRA Logout	=	
	0	JIRA Issue ID	JIRA Project ID	Task Name	Deadline	Duration	Resource 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	1	JIRAIGNORE		Order Management	NA	14 days	
10		ORDSYS-42	ORDSYS	Create 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.

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

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

A. Please provide th	at information below	to continue.
Create a Require	ements Document	
Project ID		Browse Projects
Issue Type	Task	
Priority	Trivial	•
Status	Open	-
act the 'Skip' button	if you wish to skip th	in incurs and not have it created

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

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

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

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

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



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

Send To JIF	RA AS
Send information	on from Microsoft Project to JIRA
-Send To JIRA -	
Sending ETIBL	ASTER-19

8 issue(s) have 3 issue(s) have	e been successfully updated e been successfully created
Error <mark>L</mark> ist (Click f	for details)
	Message
Issue ID	

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

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

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

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

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

selected information	will be sent to JIRA and used for upda	iting the JIRA issue.
Select All	Unselect All	
Standard Fields Cust	om Fields	
✓ Include Environm	ent	-
🗹 Include Fix Versi	n	E
☑ Include Affects V	ersion	
✓ Include Compon	ents	
☑ Include Reporter		
□ • · · • ·		172
OTE: Certain values s re required for creatin nese settings for creat	uch as issue type, status, priority, su g new issues. These values will be us ing issues.	mmary and reporter ed irregardless of

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.

Select All	Unselect All	10.000 (10.000)	
tandard Fields Custo	m Fields		
Include Customer	Email		
🗌 Include End Date			
Include Start Date			
Include Tracking (Code		
OTE: Certain values so e required for creating ese settings for creati	uch as issue type, status, g newissues. These value ingissues.	priority, summary s will be used irreg	and reporter ardless of

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.

	ie Equ	t <u>V</u> iew <u>I</u> nsert	Format Tool	s <u>P</u> roject <u>R</u> eport <u>C</u> ollabora	te <u>W</u> indow <u>.</u>	<u>I</u> IRA <u>H</u> elp	Ty
) 🖻		🛱 🙆 🕒 🛍 🛍	19 - (1 - 1	s == 🙀 🖹 🕵 🔘	¥.14	<mark>≽ ⇒ <u>S</u>how</mark> ▼	Arial
end T	Fo JIRA	Update From JIRA	Sync All Tools	🕶 🛛 Project Info Import Configu	ire JIRA Logout	Ŧ	
							1
	0	JIRA Issue ID	JIRA Project ID	Task Name	Deadline	Duration	Resource Names
1		JIRAIGNORE		- Development	NA	14 days	
2		JIRAIGNORE		E 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	1	JIRAIGNORE		Order Management	NA	14 days	
		ORDSYS-42	ORDSYS	Create Order	NA	2 days	user3
10							

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



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

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

13 issue(s) have	ve been successfully updated	
10 10000(0)1101		
	5. 1	
Error List (Click)	for details)	
Error List (Click)	for details)	1
Error List (Click)	for details)	1
Error List (Click)	for details)	1
Error List (Click)	for details)	1

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

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

 Update All Tasks (69 tasks) 	Customize
C Update Only Selected Tasks (3 tasks)	
This displays a dialog will all of the pieces of data that are exchanged in the process. You can control which pieces of data get update from JIRA from here.

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

Select All	Unselect All	
tandard Fields Cust	om Fields	
✓ Include Affects V	'ersion	
✓ Include Assignee	1	E
✓ Include Compon	ents	
✓ Include Description	ion	
✓ Include Due Date	2	
		

Sync All

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



Automatically create JIRA issues if the task is not linked

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

Automatically update slave issue if the task is associated

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

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

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

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

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

elected information will be sent to JIRA and i Exclude All	used for updating the JIR	A issue.
Standard Fields Custom Fields		
Affects Version	JIRA	
Assignee	JIRA	•
Components	Exclude	• E
Description	MS Project	
Due Date	Exclude	
Duration	Exclude	-
Environment	Exclude	•
1	-	

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

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

Link Issue

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

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



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

Link Tack To Evicti	
This tool will let you link yo task to an existing JIRA iss id in the box below.	our Microsoft Project sue. Enter the JIRA issue
Issue ID	<u>B</u> rowse JIRA Issues



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

Issue Editor

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

seneral Issue Information-	Project ID: ORDSYS 🥑 L	ink 🗌 🗌 JIRA Ignored
Summary Create Edit Customer Screen		
<< Previous Next >> << Previous Selected	Next Selected >>	Send To JIRA
View JIRA Issue		Update From JIR/
Percentage Complete: 0% <u>Click to Analyze</u>		Update Group
		A
		۸ ۱

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.

Summary Create Edit Customer Screen	Pro	ject ID	: ORDSYS	JIRA Ignored
<< Previous Next >> << I	Previous Selected	Next	Selected >>	Send To JIRA
View JIRA Issue				Update From JIRA
ercentage Complete: 0% <u>Click to Anal</u>	yze			Update Group
✓ Issue has no due date	IssuePr	ution		•
-Sub-Task You must have the Parent Issue ID field	ld mapping configured to	o use s	ub-tasks.	

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

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

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

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

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

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

ssue ID: ORDSYS-96	Pro	iect ID: ORDSYS	JIRA Ignored
<< Previous Next >>	<< Previous Selected	Next Selected >>	Send To JIRA
View JIBA Issue			Update From JIRA
Percentage Complete: 0%	lick to Analyze		Update Group
	Version 1.0	Version 1.0	
	Version 1.0	Version 1.0	

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

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

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

eneral Issue Information sue ID: ORDSYS-96	Project ID:	ORDSYS	🖁 Link 🛛 🖂	JIRA Ignored
Summary Create Edit Customer Screen				
<< Previous Next >> << Previous	Selected Next S	selected >>	Se	end To JIRA
View JIRA Issue			Upd	ate From JIRA
ercentage Complete: 0% <u>Click to Analyze</u>			Up	odate Group
Description General Components / Versions Environme NOTE: When using the envirnoment field in The Connec characters. This is a limitation of the storage ability of I Configuration dialog.	nt Custom Fields Slave F tor, you are limited to 255 Microsoft Project. You can c	Project / Issue characters an disable the us	d cannot use any e of this function t	newline through the
Description General Components / Versions Environme NOTE: When using the envirnoment field in The Connec characters. This is a limitation of the storage ability of I Configuration dialog.	nt Custom Fields Slave F tor, you are limited to 255 Microsoft Project. You can d	Project / Issue characters an disable the us	d cannot use any e of this function t	newline through the

Summary Create Edit Customer Screen	Project ID: ORDSYS	Link 🗍 JIRA Ignored
<< Previous Next >> <	< Previous Selected Next Selected >>	Send To JIRA
/iew JIRA Issue		Update From JIRA
ercentage Complete: 0% <u>Click to An</u>	alyze	Update Group
	10:32 MM	T
Start Date Provide the start date that the developer shou	8/11/2008	
work on this issue.		E

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

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

Only show configured custom fields

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

Group Update

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

date button to update the entir	e group.	
<< Return To Issue		
Update Project	Select Project	Update
Update Assigned To	_	Update
UpdateReporter		Update
Update Due Date	8/11/2008 👻	Update
Update Issue Type	-	Update
UpdatePriority	▼	Update
Update Status	•	Update

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

Task Browser

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

Select / Unselect	All	Filter View	Show All Project Tasks	-
JIRA Issue ID	Description		Status	
ETIBLASTER-14 ETIBLASTER-28	Email Marketing Tool C Email list - Bugs when	onfiguration switching pages of the	different e	
ETIBLASTER-13 ETIBLASTER-12 To Be Created	View Statistics Email Marketing Tool M Write up Detail Design	lanager Document	(New)	
ETIBLASTER-8 ETIBLASTER-16	Write up Functional De Manage Recipients Pa	esign Document de		
ETIBLASTER-3 To Be Created To Be Created ETIBLASTER-23 ETIBLASTER-19 ETIBLASTER-21	Mailer Service Add/Edit Campaign Statistics page Manage Attachments Manage Categories Email Tracker	- Iv	(New) (New)	
Exclude Se	lected Tasks	Unattach Sele	cted Tasks	View / Edit Selected

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

Exclude Selected Tasks from JIRA

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

Unattach Selected Tasks From JIRA

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

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

Mark As JIRA Ignored

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

Remove Selected From JIRA

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

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

Unlink Selected From JIRA

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

Validate Selected Tasks

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

Project Info

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

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

eneral Statistics Project Settings	
-General Project Information-	r this project plan. You can enter up to 128 characters.
Project Name: Project1	

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

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

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

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

-JIRA Field Mappings Adjust the JIRA field mappings change the location that each J	for the currer IRA value is s	tly active pr	oject plan.	You can ac	id or
Modify Mappings					
Default Project ID Default JIRA Project (C ORDSYS)ptional) Brow	wse Projects	1		
The optional project specified honew issues.	ere will be the	default proj	ect tha <mark>t</mark> ge	ts used for	creating
CAUTION: Changing these valu cause loss of data in the fields	ies after the you change.	project pla	in has bee	en initializ	ed will

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

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

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

Advanced Import

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

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

	JIRA to Microsoft Project Advanced Import	
	Welcome to the JIRA to Microsoft Project Advanced Import utility. This utility al import issues from JIRA directly into Microsoft Project. You can order, group, fi issues when you import them.	lows you to ilter, etc. the
	Start with a blank import profile	
	O Use the last specified values	
	C Select from a previously saved import profile	
	Select preconfigured import profile	
	Select Import Profile	
	Remember the last used profile	
	Remove Import Profile	

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.

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

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

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

Group tasks under project header

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

	0	Task Name	Duration	Start	Finish	Pre
1		- NSSO	2.16 days	Thu 9/11/08	Mon 9/15/08	
2	V 68	Issues entering transfers	10 hrs	Thu 9/11/08	Fri 9/12/08	
3	V 64	See where numbers come from or	90 mins	Thu 9/11/08	Thu 9/11/08	

Select a source for the impo	Project Advanced Import ort. You can selected multiple projects or multiple JIRA filters.
C Select from JIRA Projects	Select from Saved Filters
ilter Name	
Group tasks under a project he	a der Microsoft Project and all issues from the project

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



Exclude subtasks from the import

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

Consolidate subtasks during the import

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

Indent subtasks during the import

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

Import subtasks on the same level as the part task

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

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

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

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.

nport ounty		
JIRA to N	licrosoft Project Advanced Impor	t
Specify how yo	ou would like the imported issues grouped and so	rted.
Group issues as	they are imported	
Grouping issu you group by	ies will cause all issues of a like type to be groupe issue type, all of the issue types will be imported	d together. Example: If as a group.
Conver Bu		izo)
Group By	Do Not Group	v
all should be a	Create a header task for this group	
Sorting Options		
Primary Sort	Do Not Sort	T
Thindry Dore		
Thinking Soft	C Ascending C Descending	
Secondary Sort	C Ascending C Descending	•
Secondary Sort	C Ascending C Descending Do Not Sort C Ascending C Descending	•
Secondary Sort	C Ascending C Descending Do Not Sort C Ascending C Descending	

Group issues as they are imported

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

Sorting Options

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

Issue Types and R	esolutions	concrot which i	ssues win be included during the import	0101655.
	Unselect All	Select All	Unselect All	Select Al
✓ Improvement		*	✓ Incomplete	*
✓ Bug			Cannot Reproduce	
V New Feature			Pixeu	
Statuses and Prior	Unselect All	Select All	Unselect All	Select Al
Reopened		*	Minor	*
Resolved			✓ Trivial	
Closed		*	Blocker	*

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

Filter issues that get imported by the com	ivanced Import ponent and/or versions.
roject ORDSYS	Select All For All Projects
 Customer Management Order Management 	All None ☑ Include unassociated
Affects Version(s)/ Fix Version(s)	✓ Include Unassociated <u>All</u> <u>None</u>
	Version 1.0
Version 1.0	TR Manufact 1
Version 1.0 Version 1.1 Version 2.0	Version 1.1 Version 2.0

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.

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

Resource Assignment Filtering

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

If task already exists, refresh all JIRA data

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

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



Save this profile for future use

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

Browse JIRA Issues

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

69 issues foun	ıd.		Res	et Columns	Refresh
JIRA Project	ORDSYS	Browse Projects			
Issue Type	Include All Issue Types	•			
Issue Status	Include All Statuses	•	Issue Priority	Include All Prio	rities 💌
JIRA ID	Description				
ORDSYS-102	Another subtask				
ORDSYS-101	New subtask				
ORDSYS-100	Test the task				
ORDSYS-99	Another sub task				
ORDSYS-98	Sub task test				
ORDSYS-97	This is a sub task.				
ORDSYS-96	Create Edit Custom	er Screen			
ORDSYS-95	Create Add New Cu	stomer Screen			
ORDSYS-94	Subtask				
ORDSYS-93	Here is a new task				
ORDSYS-87	123123123				-
ORDSYS-86	The full description				-

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

Working with Custom Fields

The Connector can exchange custom field data with JIRA.

Using Custom Fields

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

A Connectivity Settings Options Mapping	s JIRA Defaults Sync Settings About
Connector Settings	
Remember Last Login	
Populate Microsoft Project Task Hyperli	ink field with the JIRA issue link
Cache the project list in memory for fas	ter project browsing
Use JIRA Components and Versions	Use JIRA Environment Field

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

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

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

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

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

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

Field Mappings			x
Basic Mapping Custom Fields			
Specify the storage locations of JIR optional.	A information. Some	of the values are required,	others are
Reset to Defaults	Default All		
Required JIRA Mappings			<u>^</u>
Issue ID (Required)		Text1	_ =
Project ID (Required)		Text2	_
Issue Type (Required)		Text3	-
Issue Priority (Required)		Text4	-
Issue Status (Required)		Text5	-
Optional JIRA Mappings			
		ОК	Cancel

Copyright 2007-2009 Ecliptic Technologies, Inc. – ALL RIGHTS RESERVED The Connector 1.3 User Manual – Revision A The "Custom Fields" tab of this dialog will allow you to assign the location for the custom fields you wish to exchange.

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

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

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

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

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

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

0	Task Name	Customer Tracking Number Re	ady to Update	Dura
---	-----------	-----------------------------	---------------	------

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

	14							
l		Send To	o JIRA	Update From	n JIRA Sync All	Tools • Project Info Im	port Configure JIRA L	.ogout ෫
l								
l			0	Task Name		Customer Tracking Number	Ready to Update	Duration
		1		A Testing	JIRA Issue			1 day?
l								

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.

			1990 (LA) (199		1	9 3	94 W		₽ : Они
5	Send To	JIRA	Update Fron	n JIRA Sync All	Tools	 Project Info Im 	port Configure	JIRA L	.ogout 🖕
						Link Issue			
		0	Task Name			Issue Editor		date	Duration
	1		A Testin	g JIRA Issue		Task Browser			1 day?
						Mark Selected JIRA	Ignored		
						Remove Selected F	rom JIRA		
						Unlink Selected Tas	sks	L	
						Validate Selected T	asks	-	

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

ssue ID: 10 Be Created	Project ID:		Browse Projects 🥑 Lin	ik 🗌 🗍 JIRA Ignored
Summary A Testing JIRA I	ssue	1. Prov. 1. Control 1.		
<< Previous Ne	xt >> << Previous	Selected	Next Selected >>	Send To JIRA
View JIRA Issue				Update From JIRA
ercentage Complete: 0%	6 Click to Analyze			Update Group
Here are some additional (comments.			
Here are some additional of Customer Email	comments.			
Here are some additional of Customer Email Customer's Email Address	comments.			*

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.
Seneral Issue Information Summary A Testing JIRA Issue	Browse Projects 🧳 L	ink 🛛 🗆 JIRA Ignored
<< Previous Next >> < Previous Se	elected Next Selected >>	Send To JIRA
View JIRA Issue Percentage Complete: 0% <u>Click to Analyze</u>		Update Group
Additional Comments Here are some additional comments.	This issue has a high priority to the cu inform the customer when this issue is	stomer. Please
Customer Email Customer's Email Address	joe.customer@company.com	
Start Date Provide the start date that the developer should begin work on this issue	9/24/2008	•

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

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

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

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

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

An estimate of how for the final common for the resolved. The format of this is " w "d *h *m " (representing weeks, days, hours and minutes - where * can be any null Examples: 4d, 5h 30m, 60m and 3w. Ready to Update: None Ready To Update: Customer Tracking Number: Additional Comments: This issue has a high priority to the customer. Please inform the customer when this issue resolved. Here are some additional comments. Start Date: 24/Sep/08 Provide the start date that the developer should begin work on this issue.	Stan Date.	24/Sep/08 Provide the start date that the developer should begin work on this issue.	
All estimate of non-index rotation index rotation in the resolved. The format of this is " w "d *h *m " (representing weeks, days, hours and minutes - where * can be any null Examples: 4d, 5h 30m, 60m and 3w. Ready to Update: None ▼ Ready To Update: Customer Tracking Number: Additional Comments: This issue has a high priority to the customer. Please inform the customer when this issue resolved. Here are some additional comments.	Ctart Data:		
All estimate of how ind "h m" (representing weeks, days, hours and minutes - where * can be any null Examples: 4d, 5h 30m, 60m and 3w. Ready to Update: None Ready To Update: Customer Tracking Number: Additional Comments: This issue has a high priority to the customer. Please inform the customer when this issue		Here are some additional comments.	Ŧ
Chestinate of this is 'w 'd 'h 'm' (representing weeks, days, hours and minutes - where * can be any null Examples: 4d, 5h 30m, 60m and 3w. Ready to Update: None Ready To Update: Value Customer Tracking Number: Customer Tracking Number:	Additional Comments:	This issue has a high priority to the customer. Please inform the customer when this issue is	*
Ready to Update: Ready To Update	Customer Tracking Number:	X9804399 Customer Tracking Number	
All estimate of now mount work remains until this issue will be resolved.	Ready to Update:	The format of this is ' *w *d *h *m ' (representing weeks, days, hours and minutes - where * can be any number) Examples: 4d, 5h 30m, 60m and 3w. None Ready To Update	
Original Estimate: 1d	Original Estimate:	1d An estimate of how much work remains until this issue will be resolved.	

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

joe.customer@company.com

Customer Email:

Send To	o JIRA	Update From JIRA Sync	All Tools • Project Info Imp	oort Configure JIRA	Logout 🝦
	0	Task Name	Customer Tracking Number	Ready to Update	Duration
1	<u>e</u>	A Testing JIRA Issue	X9804399		1 day

Working with Sub Tasks

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

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

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

Micro	osoft Pi	roject - Proje	ct3							
🖻 Ei	le <u>E</u> d	it <u>V</u> iew <u>I</u> r	nsert F <u>o</u> rmat	<u>T</u> ools <u>P</u>	roject	<u>R</u> eport	<u>C</u> ollaborate	<u>W</u> indow	JIRA <u>H</u> elp	Type a ques
	🖬 🕯	🖨 🛕 🗈	n 🖺 🔊 - C	🧕 e	ee 🎽	🖹 💰	0	** =	arial	•
00		d 🖸 😋	Favorites • G	io • 🐺	Project3					•
Send T	o JIRA	Update From	n JIRA Sync All	Tools • F	Project In	fo Impo	ort Configure	JIRA Logo	ut 🝦	
			A Parent Task							
	0	JIRA Issue I	D Task Name		JIRA	Issue Ty	/pe Duration	Start	Finish	Predecessors
1			A Parent Ta	ask			1 day	? Mon 9/15	/08 Mon 9/15/08	
								20 20		
-	2	8-						· · · · · · · · · · · · · · · · · · ·		

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.

🕞 Micro	osoft P	Project - Project	t3									
🔁 E	le <u>E</u> c	dit <u>V</u> iew <u>I</u> n	sert F <u>o</u> rmat	<u>T</u> ools	<u>P</u> roject	<u>R</u> eport	<u>C</u> o	llaborate	<u>W</u> indow	<u>J</u> IRA	<u>H</u> elp	Type a quest
1 🗋 🖻	7 🖬	🖨 🙆 🗈	🖺 🤊 - C	- 😫	e 💥	1 🖹 💰	0)	** =	۵	Arial	•
. 🖗 🤤		🖻 🚮 🔇	Favorites • G	io • 🛛 🐺	Project	3						-
Send T	o JIRA	Update From	JIRA Sync All	Tools -	Project	Info Imp	ort C	Configure	JIRA Logo	ut 🝦		
		C	ORDSYS-173									
	0	JIRA Issue ID) Task Name		JIF	RA Issue T	уре	Duration	Start		Finish	Predecessors
1	8	ORDSYS-17	3 A Parent Ta	ask		8	Task	1 day?	Mon 9/15	08	Mon 9/15/08	
									- 2			
		5	38					5	3	- 8-		8

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

Simple Order Managen	<u>nent System</u> : 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
All Comments V	<u>Vork Log</u> <u>Chang</u>	e History			Sort Order: 🖡

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

Micro	osoft Pro	ject - Project	3								
🖻 Ei	e <u>E</u> dit	<u>V</u> iew Ins	ert F <u>o</u> rmat	<u>T</u> ools	<u>P</u> roject	<u>R</u> eport	<u>C</u> ollaborate	<u>W</u> indow	JIRA <u>H</u> elp	Type a qu	Je
	- 🖬 🕯	🛱 🛕 📭	🔁 🔊 - (*	- 😣	ee 🎽	1 🖹 💰	0	÷ :	Arial		1
(†) (†)		a 🚮 🔍	Favorites 🕶 🛛 🤆	io - 🛛 📰	Project	3					
Send T	o JIRA U	Jpdate From .	IRA Sync All	Tools •	Project	Info Impo	ort Configure	JIRA Logou	t 🝦		
		т	his is a sub-task	for the pa	rent task						
	0	JIRA Issue ID	Task Name				IIRA Issue Type	Duration	Start	Finish	F
1 C	-		A Devent T	a k			Teek	1 day 2	No. 0/45/00	Map 0/15/09	T
1		ORDSYS-173	A Parent Ta	ISK			Task	r day?	Mon 9/15/08	MOIT ST 13/00	
1 2		ORDSYS-173	This is a su	ib-task for	the paren	t task	Task	1 day?	Mon 9/15/08 Mon 9/15/08	Mon 9/15/08	ſ
1 2		ORDSYS-173	This is a su	ib-task for	the paren	t task	Task	1 day?	Mon 9/15/08 Mon 9/15/08	Mon 9/15/08	
1	*	ORDSYS-173	This is a su	b-task for	the parent	t task	Task	1 day?	Mon 9/15/08 Mon 9/15/08	Mon 9/1	5/08

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

		0	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	V	This is a sub task for the parent tas	ik -	1 day?	Mon 9/15/08	Mon 9/15/08
		Ba	Copy Task				
	<u></u>					2	
			Paste	8	S		
			Paste Special				
			New Task				
			Delete Task				
Char		Α	Font				
ŧ			Text Styles				
l G	<u>.</u>		Task Information				18
			Task Notes	8			
		2	Request Progress Information				
		4	Show Subtasks				
			Hide Subtasks				
	- 	4	Outdent	~			
		4	Indent				
		0	Hyperlink				
	•	3	цурсника				
Re	ady						

🖪 Mici	rosoft P	roject - Projec	t3						
19 E	ile <u>E</u> o	lit <u>V</u> iew <u>I</u> n	sert F <u>o</u> rmat	<u>T</u> ools <u>P</u> roject	<u>R</u> eport	<u>C</u> ollaborate	<u>W</u> indow	JIRA <u>H</u> elp	Type a que
10	2	🖨 🙆 🗈	🔁 🔊 - (*	• 😫 🖙 💥	i 🗎 💰		<u> </u>	🔿 🛛 Arial	
	ÐX	a 🙆 🖏	Favorites • G	o 🕶 📑 Projec	t3				
Send	To JIRA	Update From	JIRA Sync All	Tools • Project	Info Imp	ort Configure	JIRA Logou	t ₌	
	10								
	0	JIRA Issue ID	Task Name		0	JIRA Issue Type	Duration	Start	Finish
1		ORDSYS-17	3 🖃 A Parent T	ask		Task	1 day?	Mon 9/15/08	Mon 9/15/08
1		ORDSYS-17	3 - A Parent T This is a	ask sub-task for the pa	arent tas	Task	1 day? 1 day?	Mon 9/15/08 Mon 9/15/08	Mon 9/15/08 Mon 9/15/08
1		ORDSYS-17	3 - A Parent T This is a	ask sub-task for the pa	arent tas	Task	1 day? 1 day?	Mon 9/15/08 Mon 9/15/08	Mon 9/15/08 Mon 9/15/08
1		ORDSYS-17	3 ⊡ A Parent T This is a	ask sub-task for the pa	arent tas	Task	1 day? 1 day?	Mon 9/15/08 Mon 9/15/08	Mon 9/15/08 Mon 9/15/08

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

E M	licros	oft Pro	oject - Projec	t3									
9	<u>F</u> ile	<u>E</u> dit	: <u>V</u> iew <u>I</u> n	sert F <u>o</u> r	rmat	<u>T</u> ools	<u>P</u> roject	<u>R</u> eport	<u>C</u> ollaborate	•	<u>W</u> indow	JIRA <u>H</u> elp	Type a qu
1	2		🛱 🛕 i 🗈	🔁 I 🤊	- (*	- 😣	ee 💥	1 🖹 💰			₩ ₩	🔷 🛛 Arial	
9	6	×	o 🚹 🖏	Favorites	• <u>G</u>	o • 🛛 🐺	Project	3					
Sen	d To	JIRA (Update From	JIRA Syn	c All	Tools •	Project	Info Impo	ort Configur	e .	JIRA Logou	t 🝦	
						Li	nk Issue			Γ			
		0	JIRA Issue ID	Task Na	me	Is	sue Editor	r -			Duration	Start	Finish
	1 🤅	2	ORDSYS-17	3 - A Pa	rent T	Т	ask Brows	er		k	1 day?	Mon 9/15/08	Mon 9/15/08
	2			T	his is a	N	lark Select	ted JIRA Ig	nored		1 day?	Mon 9/15/08	Mon 9/15/08
						R	emove Se	lected Fro	m JIRA	L			
-						U	nlink Sele	cted Tasks	5	H			
	_					V	alidate Se	lected Tas	ks	F			

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

ue Editor			X
General Issue Information Issue ID: To Be Created	Project II	: ORDSYS 🥑 Link	JIRA Ignored
Summary This is a sub-task for the parent task			
<< Previous Next >> <<	Previous Selected Next	: Selected >>	Send To JIRA
View JIRA Issue			Update From JIRA
Percentage Complete: 0% Click to Ana	lyze		Update Group
Due Date 9/14/2008 💌	Issue Priority Issue Resolution	Trivial	•
_Sub-Task			
This task is a sub-task in JIRA Parent Issue ID: ORDSYS-173	View Parent JIRA Issue Browse JIRA Issues		
			Save Cancel

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

Sub	o-Task			
	This task is a sub-tage	isk in JIRA	View Parent	JIRA Issue
	Parent Issue ID:	ORDSYS-173	В	rowse JIRA Issues

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

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

Sub-Task	sk in JIRA <u>View Parent JIRA</u>	Issue	
Parent Issue ID:	ORDSYS-173 Brows	e JIRA Issues	
P		Sa	ve Cancel

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

l	Se	end To	o JIRA	Update From J	IRA Sync All Tools - Project Info Import	Configure JIRA	Logout 🖕			
L				O	RDSYS-178					
l			0	JIRA Issue ID	Task Name	JIRA Issue Type	Duration	Start	Finish	Predece
L		1	٩.	ORDSYS-177	A Parent Task	Bug	1 day?	Mon 9/15/08	Mon 9/15/08	
L		2	۹.	ORDSYS-178	This is a subtask for the Parent Task	Sub-task	1 day?	Mon 9/15/08	Mon 9/15/08	
L										

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

Simple Order Managem	nent System				
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	the Parent Task	🗟 🐣 Onen	Unassigned	Sub-Task Progr	ess:
New:		Sub-task 🖌 😰	Unassigned 🗸	Assign to me	Add
All Comments V There are no comments	Vork Log Chang yet on this issue	e History			Sort Order: 🖏

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

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Creating a sub-task in JIRA

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

Simple Order Managen	<u>nent System</u> :						
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	e Spent:	Unknown
Sub-Tasks: All Open					s	ub-Task Progress:	
1. This is a subtask for	the Parent Task	D 🐴	Open l	Jnassigned	Ŷ	Resolve Issue Clo	se Issue
2. A sub task created th	rough JIRA	D 🛉	Open U	Jnassigned	Ŷ	Resolve Issue Clo	<u>se Issue</u>
New:		Sub-task 🛩	?	Unassigned 🔤	✓ Assign	to me	Add
<u>All</u> Comments <u>V</u>	<u>Vork Log</u> <u>Chang</u>	e History					Sort Order: 🖡
The supervision of the second states	und an this is sure.						

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

🗋 💕 🔇 🔇 Send To	JIRA U	🕽 🛃 🙇 🦈 🖻 🚮 🔍 Fa pdate From JIRA	🔏 🖻 🔁 🏈 🤊 😒 ∞ 🐝 💥 vorites ▼ Go ▼ 😽 C:\Documents and Sett Sync All Tools ▼ Project Info Import Confi	ings\Pat\My Docum gure JIRA Logout	👌 No Group ents\SubTasks	• 0	2 Q 🍞 1	
	0	JIRA Issue ID	Task Name	JIRA Issue Type	Duration	Start	Finish	F
2	<u>.</u>	ORDSYS-106 ORDSYS-107	A Parent Task This is a subtask for the Parent Task	Sub-task	1 day? 1 day?	Tue 04/22/08 Tue 04/22/08	Tue 04/22/08 Tue 04/22/08	
	Send To 1 2		Image: Send To JIRA Image: Send To JIRA Update From JIRA Image: Send To JIRA Update From JIRA Image: Send To JIRA Update From JIRA Image: Send To JIRA Update Image: Send To JIRA Image: Send To JIRA Update Image: Send To JIRA Image: Send To JIRA Update Image: Send To JIRA Image: Send To JIRA Update Image: Send To JIRA Image: Send To JIRA Update Image: Send To JIRA Image: Send To JIRA Update Image: Send To JIRA Image: Send To JIRA Update Image: Send To JIRA Image: Send To JIRA Update Image: Send To JIRA Image: Send To JIRA Update Image: Send To JIRA Image: Send To JIRA Update Image: Send To JIRA Image: Send To JIRA Update Image: Send To JIRA Image: Send To JIRA Update Image: Send To JIRA	 Image: Send To JIRA Update From JIRA Sync All Tools • Project Info Import Confi JIRA Issue ID Task Name ORDSYS-106 • A Parent Task ORDSYS-107 This is a subtask for the Parent Task 	Image: Image	Image: Image	Image:	 Image: Image: Ima

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

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

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

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

								-	
. (\$ \$	×	🖻 🚮 🔍 Fa	avorites 🕶 💁 🗧 📑 C:\Documents and Set	tings\Pat\My Docum	ents\SubTasks	.mpp 💽 🚽		
2	5end To	JIRA U	pdate From JIRA	Sync All Tools 🕶 Project Info Import Confi	igure JIRA Logout	-			
			A si	ub task created through JIRA					
		0	JIRA Issue ID	Task Name	JIRA Issue Type	Duration	Start	Finish	ľ
	1		ORDSYS-106	🖻 A Parent Task	Bug	1 day?	Tue 04/22/08	Tue 04/22/08	Ī
	2		ORDSYS-108	A sub task created through JIRA	Sub-task	0 days	Tue 04/22/08	Tue 04/22/08	Ī
	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.

(③ ③ ③ ③ ③ ④ ▲ ④ ▲ Favorites ▼ ④ 0 ▲ ☐ C:\Documents and Settings\Pet\My Documents\SubTasks.mpp ▼ ☐ Send To JIRA Update From JIRA Sync All Tools ▼ Project Info Import Configure JIRA Logout ☐ A Parent Task ● JIRA Issue ID Task Name ● JIRA Issue ID Task Name ● ORDSYS-106 ● A Parent Task ● ORDSYS-108 A sub task created through JIRA Sub-task 2 days ● ORDSYS-108 A subtask for the Parent Task ● ORDSYS-108 A subtask for the Parent Task																		
2	iend To	JIRA U	pdate From JIRA	Sync All Tools • Project Info Import Confi	gure JIRA Logout	÷													
			A P	arent Task															_
		0	JIRA Issue ID	Task Name	JIRA Issue Type	Duration	Start	Finish	Predecess			Aj	or 20), 'OB	}		A	pr 27	, '08
		-								F	S	S	M	τV	V T	FS	s s	M	TΙV
	1		ORDSYS-106	🖃 A Parent Task	Bug	5 days	Tue 04/22/08	Mon 04/28/08					Ų	-				-	1
	2	۰.	ORDSYS-108	A sub task created through JIRA	Sub-task	2 days	Tue 04/22/08	Wed 04/23/08							1 1				
	3		ORDSYS-107	This is a subtask for the Parent Task	Sub-task	3 days	Thu 04/24/08	Mon 04/28/08	2						Ď				

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.

(90		🖻 🚮 🔍 Fa	avorites 🕶 💁 🗧 📑 C:\Documents and Sett	ings\Pat\My Docum	ents\SubTasks	.mpp 🔹 🚽											
S	iend To	JIRA U	pdate From JIRA	Sync All Tools 🕶 Project Info Import Confi	gure JIRA Logout	-												
		0	JIRA Issue ID	Task Name	JIRA Issue Type	Duration	Start	Finish	Predecess			Apr :	20,'()8		A	pr 27,	'08
										F	S	SM	T	W T	F	s s	MT	i V
	1		ORDSYS-106	A Parent Task	Bug	5 days	Tue 04/22/08	Mon 04/28/08					-		-			
	2	۵.	ORDSYS-108	A sub task created through JIRA	Sub-task	2 days	Tue 04/22/08	VVed 04/23/08										
	3	۹.	ORDSYS-107	This is a subtask for the Parent Task	Sub-task	3 days	Thu 04/24/08	Mon 04/28/08	2					Ì				
			I															

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

Simple Order Manageme	ent Sy	<u>stem</u>										
• A Parent Task												
Created: Yesterday 11:39 PM	l Upda	ated: Today 12	2:21 AM									
Component/s:	Non	ne										
Affects Version/s:	Non	ne										
Fix Version/s:	Non	ne										
Original Estimate:	1	1 week	Remair	ning Estim	nate:		Unknown		Time	e Spent:	U	nknown
Sub Taska: All Onen									0			
Sub-rasks. All <u>Open</u>									- 50	ib-Task Prog	ress:	
1. This is a subtask for t	he Par	rent Task		đ	🐴 Open	Un	assigned		Ŷ	Resolve Issu	Je Close	<u>issue</u>
2. A sub task created thr	ough .	JIRA		ī	🐴 Open	Un	assigned	企		Resolve Issu	ue Close	issue
New:			S	ub-task 📉	/ 🖓	U	nassigned	× <u>A</u>	ssign	<u>to me</u>		Add
<u>All</u> Comments <u>W</u>	ork Lo	og <u>Change</u>	History									Sort Order: 🖡

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

Simple Order Management	<u>nt System</u> 3-106) task for the Updated: Today	Parent Task 12:21 AM			
Component/s:	None				
Affects Version/s:	None				
Fix Version/s:	None				
Original Estimate:	3 days	Remaining Estimate:	Unknown	Time Spent:	Unknown

All Comments Work Log Change History

There are no comments yet on this issue.

Simple Order Managemer	nt System				
A Parent Task (ORDSYS	-106)				
A sub task cr	eated throu	ugh JIRA			
Created: Yesterday 11:55 PM	Updated: Today 1	2:21 AM			
Component/s:	None				
Affects Version/s:	None				
Fix Version/s:	None				
Original Estimate:	2 days	Remaining Estimate:	Unknown	Time Spent:	Unknown
				·	

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

Sort Order: 🖡

Importing Sub Tasks

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



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

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.

Data Evchange Bules			
Enable Data Exchange Rules	Configure Rules		
	ок Са		

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.

Add Rule	Edit	Delete	Configue	
Active Rule Name			Rule Type	
Completion	Order		Issue Linking	

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.

dit Rule						X
-Rule Nam	e —					
Provide	a name fo	r this rule	0			1.45
Apply Ru	e During-					
Send	To JIRA					
🔽 Upd	ate From 2	JIRA				
Impo	ort from J	IRA				
	a constante 					
Select th	e type of	rule to de	fine			
						•
L						
		<< Bar	ck [Next >	>	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.

Provide a name for this rule
Exclude Duplicates
Apply Rule During
Send To JIRA
✓ Update From JIRA
✓ Import from JIRA
-Rule Type
Select the type of rule to define
Issue Exclusion

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".

Update/Import From JIRA
JIRA Link Type
Exclude the issue if the issue has an outbound link of type:
Duplicate
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.

Update/Import From JIRA Send To JIRA
-JIRA Link Type
If the issue has an outbound link of type:
Depends
Action-
 Make the linked issue a predecessor
C Make the linked issue a successor
Project Link Type
Create Project links of type:
Finish-to-Start (FS)
Finish-to-Start (FS)
Start-to-Start (SS)
Finish-to-Finish (FF)
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.

Data Exch	ange Rules	
Ado	i Rule Edit Delete C	onfigue
Active	Rule Name	Rule Type
	Create Dependency	Issue Linking
	Exclude Duplicates	Issue Exclusion

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 a 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.

onfigure	×.
Export the configured rules to an XML reuse.	file for sharing and
Export Rules	
Import a previously saved rules file fro state or a different user.	m a previously saved
Import Rules	
	Close
	ciose

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.

General Mappings Duration and Work Calculation	Modes Work Logs	
JIRA Work Log Import Action		
Enable JIRA work log importing (requires JIRA work logs will be mapped to actual assignments in Microsoft Project.	extended web services). Il work fields of task resour	ce
🔽 Set task start date to date of first v	vorklog entry.	
☐ Set task finish/deadline date to the	date of the last work log	
🔲 Only if issue remaining est	mate is zero	
🔲 Only if issue status is: Red	pened 💌	
Include work logs done by the ass	gnee.	
📕 Include work logs not done by the	ssue assignee.	
Some issues in JIRA may have wo the person assigned to the issue. those work logs as work done by i not checked, those work logs will	k logs from users other tha Checking this option will imp he assignee. If this option is be ignored.	in oort s
	ок	Cance

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