

Relativity for JIRA

Version 1.1.1.1

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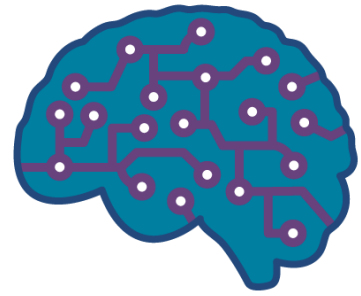
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Concept

Why Relativity for JIRA?

Introduction



One of the great features of JIRA is the power it provides users to connect related issues. JIRA, however, with all its great flexibility, doesn't provide much control in guiding users with the type of connections or links they can make or indeed the issues to link to.

This can lead to non-compliance with business processes and business rules and a loss of information integrity. Complex business rules require an element of control. The pressure on administrators to ensure compliance and integrity is mounting and can become unbearable. Typically, an administrator would use non-JIRA skills to codify rules, potentially introducing errors and bugs. The administrator's control diminishes even further. Administrators become over-burdened and ultimately become the bottleneck. The consequences: day-to-day operations suffer, administrators get lost in fire-fighting, the system and user community experience backdrops in efficiency, managers will question the investment in JIRA as confidence in reporting and decision making suffers, adoption levels go down.

Relativity for JIRA supports compliance and business rules. It uses intelligent, rules-based building of complex relationships between issues across one or more projects. It is effortless and error free. Administrators implement the business and/or compliance rules using Relativity for JIRA via a clear and simple administration interface. The result: users are now in a controlled environment that guides them on the combinations and permutations of links to move business processes along. Managers can rely on the quality of the underlying data for reporting and decision making.

The key beneficiaries of Relativity for JIRA are:

- Managers provided with the confidence in quality, consistency and structure of the underlying data to make informed decisions.
- End users are presented with simplicity of data input and any related choices presented through the JIRA interface.
- System administrators can enforce business rules to support information integrity in an efficient manner.

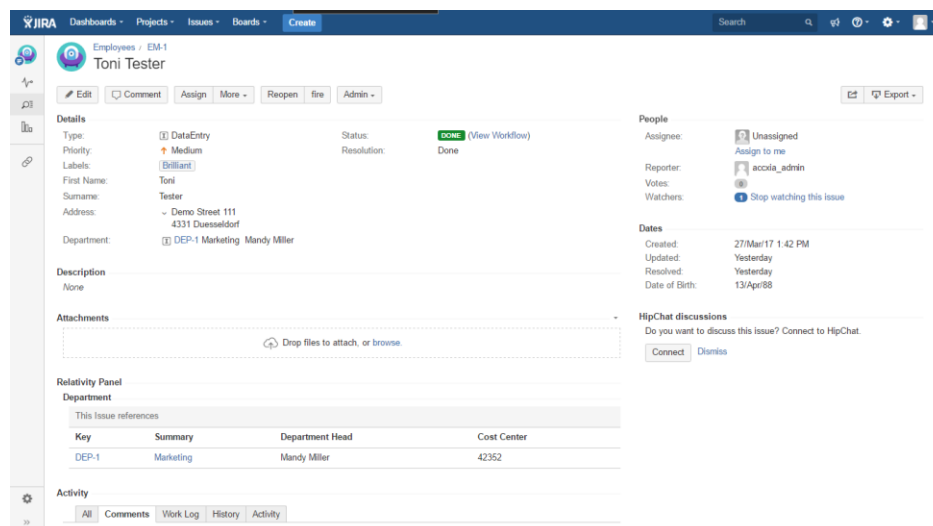
The Solution

Relativity consists of several modules:

- Relativity Custom Fields - for better User Experience and Guidance
- Relativity Web-Panel - for Structured Information at a glance
- Relativity JQL Functions - for easy Search and better User experience

Relativity Custom Fields

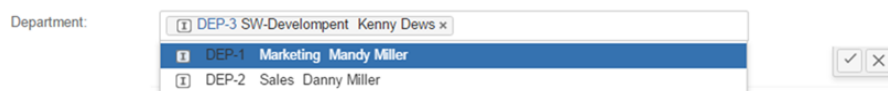
Relativity Custom Fields are implemented to help administrators create rules based parent/child relationships and hierarchies easily in JIRA. There is no limit to the number of relationships that can be specified. This feature works in addition to JIRA standard subtasks and issue linking functionalities. From an end user perspective the meaning and context of a Relativity field is implied by the name given to it.



The custom field looks like the one below

Department: DEP-1 Marketing Mandy Miller

Editing is easy, selection options are retrieved via JQL from any other issue fields



There are two types of Relativity Custom Fields that can be configured. These are "Multi Select Custom Field" and "Single Select Custom Field". JIRA's standard selection options provide for static data choices and have needed to be entered by the administrator, with Relativity for JIRA these options are retrieved via JQL from any issue information in JIRA or in a next release even from other Data Sources. For all options, you can select how you want

to render them in the Selection list and/or in the Web-Panel. Simply select the fields you want to display in the admin configuration menu.

Relativity supports databinding in a way that allows for the easy creation of multilevel cascaded selections.

Relativity Web-Panel

The Relativity Web-Panel displays all related Relativity Custom Fields information at a glance as part of the issue screen. In addition, you can change the existing subtask panel to define what fields should be presented. You can configure the display of columns according to your needs.

Relativity Custom Fields shown in the Web-Panel

Relativity Panel

Department

This Issue is referenced by

Key	First Name	Surname	Status	Address
EM-5	Andy	Anderson	FIRED	Any Street Any Where
EM-3	Bob	Tale	TO DO	Demostreet 18 44031 Centerport
EM-2	Mandy	Json	TO DO	Demo Street 551 45671 Democity
EM-1	Toni	Tester	DONE	Demo Street 111 4331 Duesseldorf

Subtasks before Relativity

Sub-Tasks

1.	Development	TO DO	Unassigned
2.	Feedback F2F	DONE	Unassigned
3.	Bonus Negotiation	TO DO	admin

Subtasks with Relativity

Subtasks

Key	Summary	Assignee	Status	Due Date
DD-9	Bonus Negotiation	admin	TO DO	19/May/17
DD-8	Feedback F2F		DONE	
DD-7	Development		TO DO	17/Aug/17

Relativity JQL Functions

Relativity for JIRA comes with some sophisticated JQL functions that are used within Relativity itself. Additionally these are available for end user in advanced and basic issue search. These functions enable the user to search full text in Relativity Custom Fields even the user can search for parts of the issue key.

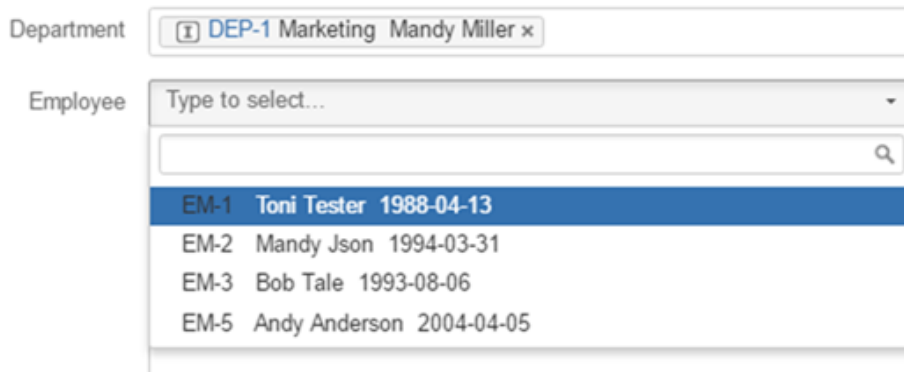
Relativity Cascaded Selects

Since Relativity for JIRA supports Databinding, you can create cascading selects with dynamic options easily, all options are retrieved via JQL query.

The example show how to first select a department

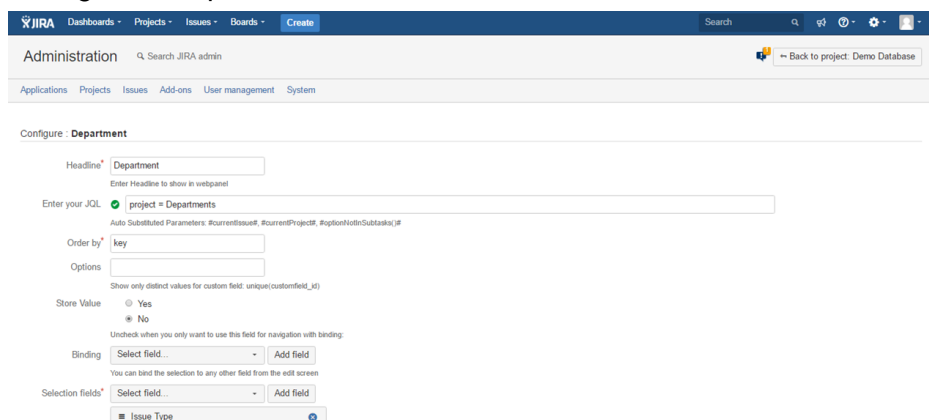


And later one get only employees assigned to this department as selection options.



Relativity Easy Administration

For the Admin there is a slick administration GUI available, to configure Relativity for JIRA settings properly. The administration interface is integrated into the existing Custom Field Configuration options.



User Guide

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Introduction

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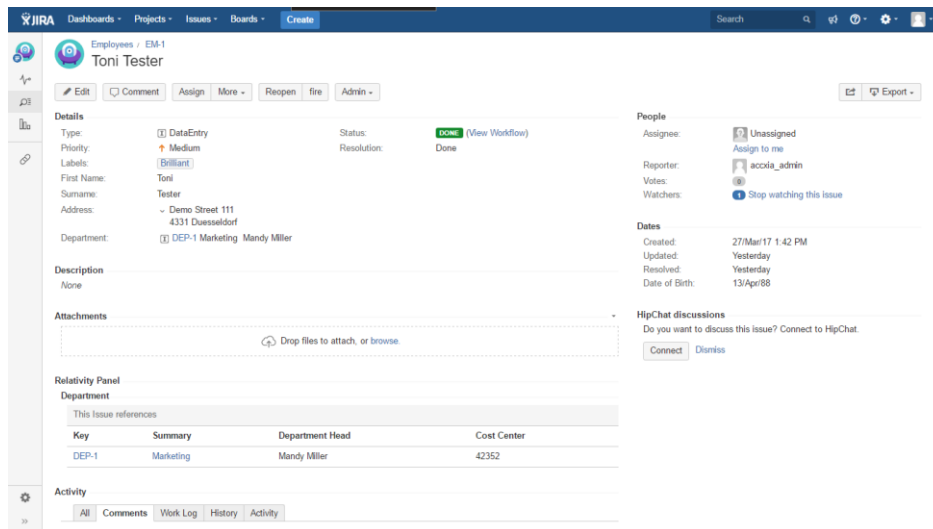
Relativity for JIRA is an add-on for JIRA that helps to simplify the choices an end user has to make with the additional benefits of reducing inaccurate information and reducing the burdens on JIRA administrators.

In a Relativity powered environment logical links between Custom fields are established at a project level. Sitting behind these logical links are rules that establish the information that is rendered to an end user to choose from. For example in a JIRA implementation for managing customer sales orders, an Issue in an Orders project can be established with a Customer field that takes its values from a dynamically selected list of options taken from a project holding Customer details.

This approach saves end users needing to use standard JIRA linking features, that while extremely powerful, can lead to wrong types of links being established against incorrect projects or issues.

So let's dive in and take a look at the custom field choices from an end user perspective.

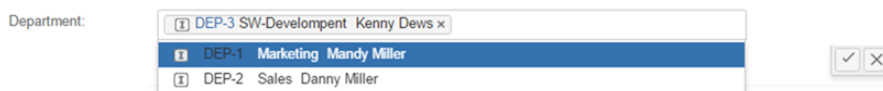
Relativity Custom Fields



The custom fields look like the one below. In the example we always want to know who is the boss of our employees to be able to escalate easily 😊 So we asked the Administrator to add this information to the field rendering.

Department: DEP-1 Marketing Mandy Miller

Editing is easy, selection options are retrieved via JQL from any other issue fields



There are two types of Relativity Custom Fields that can be configured. These are "Multi Select Custom Field" and "Single Select Custom Field". JIRA's standard selection options provide for static data choices and have needed to be entered by the administrator, with Relativity for JIRA these options are retrieved via JQL from any issue information in JIRA or in a next release even from other Data Sources. For all options you can select how you want to render them in the Selection list and/or in the Web-Panel. Simply select the fields you want to display in the admin configuration menu.

Deleted Entries

Relativity for JIRA includes the capability to retain connection information to Issues that have already been deleted. In the event that these links shown in red in the example below are no longer required the user simply can finally remove them while editing the field.

Employee: EM-4

Never the less we do not recommend to delete issues in JIRA, think about hiding them by changing the status instead.

Reverse Relativity

Although fundamentally this is what the Administrator will get involved in. In essence we're saying that we sometimes need a reverse relationship when a rule is setup to indicate an initial relationship. When assigning e.g. departments to employees, we want to be able to see what employees belong to which department. With Relativity for JIRA's reverse relativity fields this becomes an easy task.

That said it's not always required to show the two-way relationship and we allow that choice to be made with configurations in Screens.

Relativity Panel

Department

This Issue is referenced by				
Key	First Name	Surname	Status	Address
EM-5	Andy	Anderson	FIRED	Any Street Any Where
EM-3	Bob	Tale	TO DO	Demostreet 18 44031 Centerport
EM-2	Mandy	Json	TO DO	Demo Street 551 45671 Democity
EM-1	Toni	Tester	DONE	Demo Street 111 4331 Duesseldorf

Subtask Relativity

As you will have gathered Relativity for JIRA is all about making choices easier and displaying those choices in a clear way. We've applied our Web-Panel feature to the visualisation of subtasks as well.

Key features are:


- Sort after every column
- Every column field can be rendered
- Field column order is changeable
- Tailored view per project

Before

Sub-Tasks

1.	Development	TO DO	Unassigned
2.	Feedback F2F	DONE	Unassigned
3.	Bonus Negotiation	TO DO	admin

After

Subtasks + ▼				
Key	Summary	Assignee	Status	Due Date
DD-9	Bonus Negotiation	 admin	TO DO	19/May/17
DD-8	Feedback F2F		DONE	
DD-7	Development		TO DO	17/Aug/17

Web-Panel

Of course having used custom fields to simplify the options for linking issues together an end user will want to see the relevant information within a JIRA Issue Screen. The Relativity Web-Panel is highly configurable in terms of the information presented. A section on the options available including sort order for every column displayed can be found at Relativity Web-Panel. Also the order of shown Web-Panels can be influenced by the headline name. Configuring the Web-Panel is an administrator function.

Our Web-Panel works in both directions. Hence in the sales order example we used earlier in this guide the Web-Panel from an Order Issue will show the related Customer Issue reference (and name if desired). Likewise looking at the Customer issue will show a list of linked Orders for that Customer. All delivered without the end user needing to originally indicate the nature of the link between the two projects using the standard JIRA options.

As you remember Relativity Subtask Custom Field and Reverse Relativity simply enable rendering of related information in the Web Panel.

See the differences between "This issue references" and "This issue is referenced".

Relativity Panel			
Department			
This Issue references			
Key	Summary	Department Head	Cost Center
DEP-1	Marketing	Mandy Miller	42352

Relativity Panel				
Department				
This Issue is referenced by				
Key	First Name	Surname	Status	Address
EM-5	Andy	Anderson	FIRED	Any Street Any Where
EM-3	Bob	Tale	TO DO	Demostreet 18 44031 Centerport
EM-2	Mandy	Json	TO DO	Demo Street 551 45671 Democity
EM-1	Toni	Tester	DONE	Demo Street 111 4331 Duesseldorf

Searching for issues

Issues can be selected using JIRA's JQL functionality as well as some extended functions we've created.

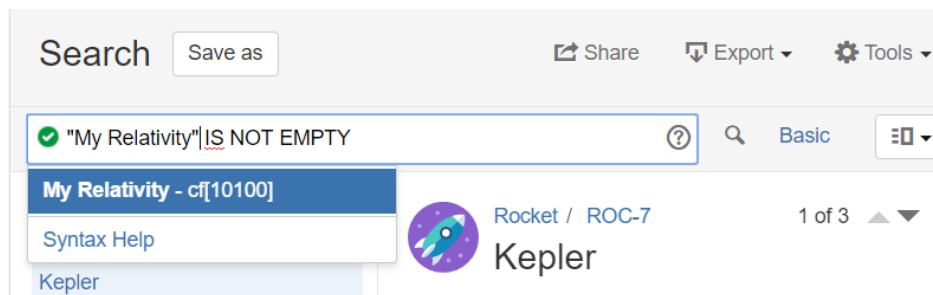
Related Pages:

- [Basic searching](#)
- [Advanced searching](#)

Basic search

Custom fields

You can search after every defined Relativity Custom Field like all other fields.



Advanced search

You have almost super powers with Relativity's integrated JQL functions. We introduce them for increasing performance for the special functions in Relativity.

JQL Auto Completion is completely supported by Relativity for JIRA custom fields

IssueKeyContains()

Get all issue keys which starts with given key.

Allow to use something like this: `key = "ROC-1%"`

Syntax	IssueKeyContains(jql, key)
Parameters	<ol style="list-style-type: none"> 1. JQL string to apply as general filter (optional) 2. Key matching from the beginning of the Issue Key (optional)
Returns	List of keys
Example	<code>key IN IssueKeyContains('','', "ROC-1")</code>

GetRelativityHaving()

Get all fields having a relativity field with name "RelativityFieldName" where the linked issue matches the JQL Query.

Syntax	GetRelativityHaving(cf, jql)
Parameters	1. Custom field ID or name 2. JQL query
Returns	List of keys of relativity elements
Example	<code>key IN GetRelativityHaving("myParent", "key = TR-123")</code>

GetRelatedIssueFrom()

For a given Issue which is using the Relativity field with the specified name show all Issues linked via the relation field.

Syntax	GetRelatedIssueFrom(cf, jql)
Parameters	1. Custom field ID or name 2. JQL query
Returns	List of keys of relevant issues
Example	<code>key IN GetRelatedIssueFrom("customfield_11803", "key = TR-123")</code>

Administrator Guide

Before you begin

Administration features within Relativity for JIRA are only available to [JIRA System Administrators](#) and [JIRA Administrators](#).

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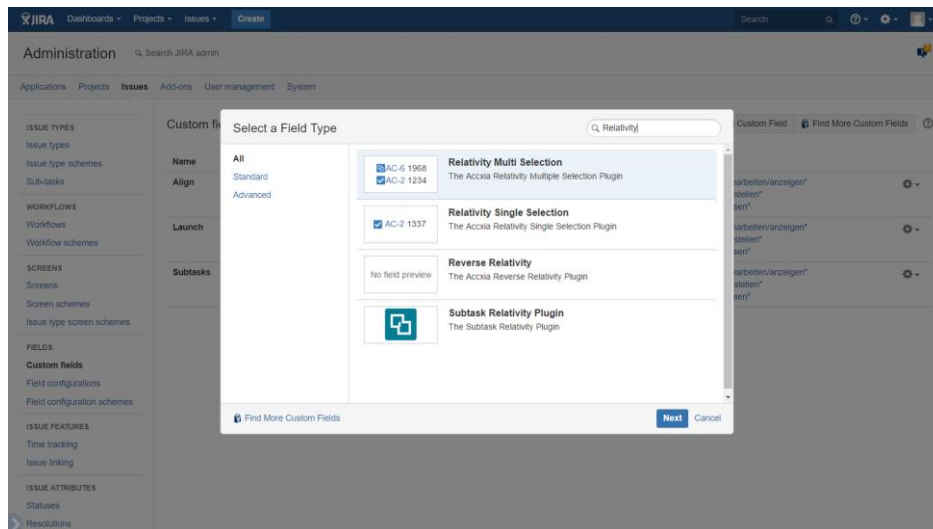
Relativity for JIRA - Configure

Create Custom Field

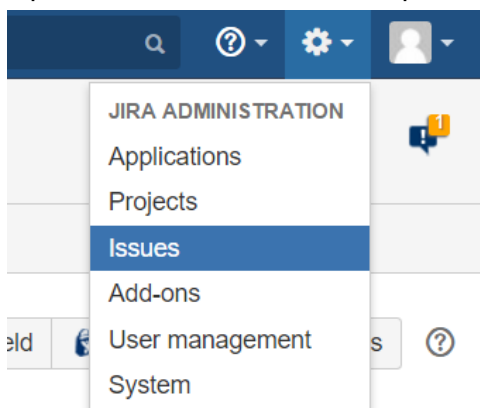
Relativity custom fields are created like any other custom field.

Related Pages:

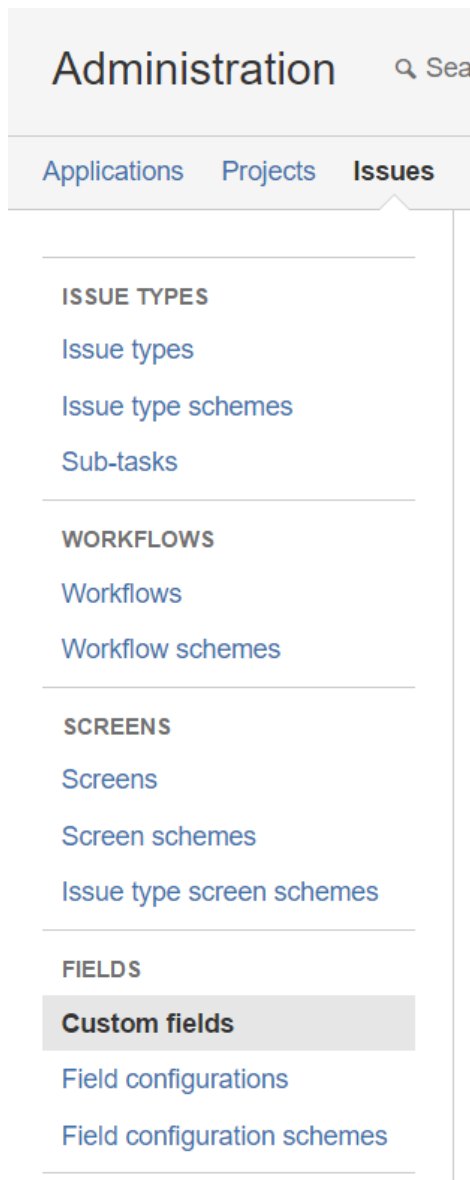
- [JIRA Adding a Custom Field](#)



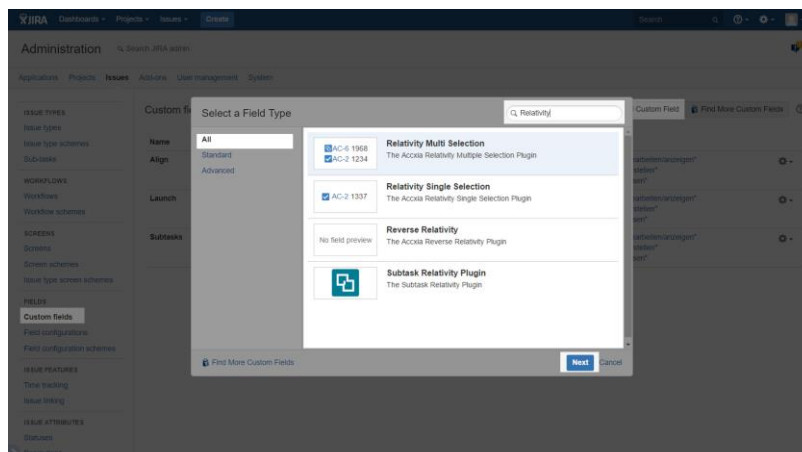
1. Open JIRA-Administration Drop-down and select **Issues**



2. Select from section Fields the page **Custom Fields**



3. Add Custom Field
 1. All
 2. Search **Relativity**
3. Next



4. Enter name and optional description and click **Create**

Configure 'Relativity' Field

Name *
My Relativity

Description

Previous
Create
Cancel

5. Configure Screens and finally update

Please do not use "Choose applicable context" in "context configuration"
In JIRA this disables most of the custom fields search functionality, especially the JQL auto completion.

Configure Custom Field

Once a Custom Field is created then it can be configured to your needs.

For more general information see here:

<https://confluence.atlassian.com/display/JIRA/Configuring+a+Custom+Field#ConfiguringaCustomField-configure>

And for Screens using here:

<https://confluence.atlassian.com/display/JIRA/Specifying+field+behavior#Specifyingfieldbehavior-changingfieldsModifyingfieldbehavior>

Instructions on how to configure Relativity for JIRA follow below.

Relativity Configuration

1. Open **Configure Custom Field**
2. Edit Selected Values
3. Type in, choose, sort whatever you want (see below)

Configure : **Launch**

Headline*
Enter Headline to show in webpanel

Enter your JQL ☒
Auto Substituted Parameters: #currentIssue#, #currentProject#, #optionNotInSubtasks()#, getBoundValue(customfield_xxx)

Options
Show only distinct values for custom field: unique(customfield_id)

Store Value ☒ Yes ☐ No
Uncheck when you only want to use this field for navigation with binding

Enable Inline Edit ☒ Yes ☐ No
Uncheck when you want to disable inline edit for bound fields (inline edit can not work with bound fields).

Binding
You can bind the selection to any other field from the edit screen

Selection fields*

☒ Issue Type ☒

☒ Key ☒

☒ Summary ☒

Please select the fields to display/render in the Selection
You can reorder with drag and drop.

Web-panel fields
Please select the fields you want to display in the web-panel.
You can reorder with drag and drop.
If no fields are selected, no web-panel is shown.

(Example view from Relativity Single Selection)

Default values

Please note:

Greyed out cells can't be configured.

	Headline	Selection mode	JQL	JQL options	Store value	Inline Edit	Binding	Selection fields	Web-Panel fields
Relativity Multi Select	[Custom field name]	Multi			Yes	Yes		1. Issue Type 2. Key 3. Summary	
Relativity Single Select	[Custom field name]	Single			Yes	Yes		1. Issue Type 2. Key 3. Summary	
Reverse Relativity	[Custom field name]								1. Issue Type 2. Key 3. Summary
Relativity Subtask	[Custom field name]								1. Key 2. Summary 3. Assignee 4. Status

Headline

Text in Web-Panel header.

If multiple Web-Panels exists, these panels are ordered by Headline text.

JQL

All JQL functions are valid as well as Relativity JQL Functions.

Don't be afraid to type something not compatible. It's got a live validator.

You can leave this empty, if you don't want any filtering.

In general when using JQL be aware of possible performance impacts. For details see <https://confluence.atlassian.com/display/jirakb/Understanding+JQL+performance>

Related Pages:

- [Issue fields and statuses](#)

Additional Auto Substituted Parameters

Extend your JQL query for following parameters:

Parameter	Description
#currentIssue#	Key of current visible issue E.g. key = #currentIssue#
#currentProject#	Project key of current visible issue. E.g. project = #currentProject#
#optionNotInSubtasks()#	Checks if option is neither in subtasks of current visible issue, nor in any related issue, parent or similar. E.g. key = #optionNotInSubtasks()#
getBoundValue(xxx)	Current values from editor for bound relativity custom field. "Single Selection Field" = getBoundValue('customfield_10000')
getBoundValue(customfield_xxx, default value)	In case there is no binding shown at the page, you can define a default value, e.g. getBoundValue('customfield_10000,#currentIssue').

Order by

Specific text for custom ORDER BY in JQL query.

E.g. `key desc` for descending issue keys

Options

Show only distinct values for custom field: `unique(customfield_id)`

Store value

You can choose if the selected value in this custom field should be stored or only be rendered.

This allows you to use a binded custom field only for navigation and filtering and you do not have to store this value. But if no field is bound to this, it will still be saved.

Enable Inline Edit

When using bindings you might want to disable inline editing for the related fields since only when inline editing is disabled you can ensure data integrity. Select here whether to enable or disable.

Bindings

You can bind the selection to any other Relativity Single Custom Field from the edit screen. The Bindings option helps you to create a binding easily. For advanced binding see the `getBoundValue(yyy)` function in advanced bindings.

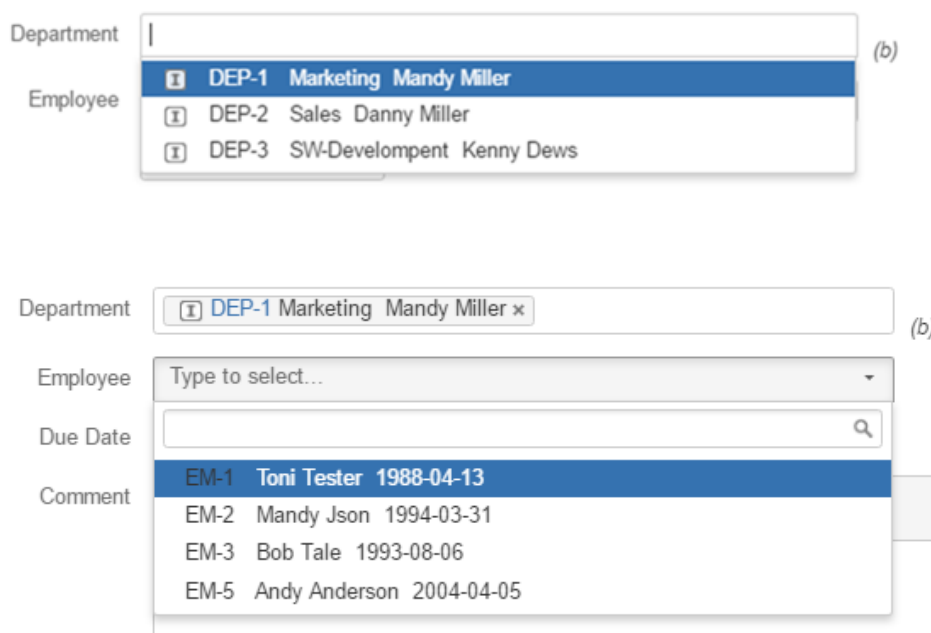
A quick example: Let's assume an organisation has employees that belong to a number of departments. In JIRA this is represented by a JIRA project called "departments" that includes an issue for each of the departments in the organisation. Employees are stored as individual issues in an "employee" project. The business need for a new project is to be able to select users belonging to a specific department.

How to:

In the Employee issue there is a Relativity Custom field "department".

In the overall project you do not want to store this assignment in addition but you want to use it for navigation and filtering.

As an administrator you can "bind" the "Employee" field to the "Department". This way only matching selection options will be retrieved (Cascaded Select). Since the assignment of employees to departments should not be stored twice, the admin selected the "Store value" option "no".



The screenshot shows a form with two fields: "Department" and "Employee". The "Department" field has a dropdown menu open, showing three options: "DEP-1 Marketing Mandy Miller", "DEP-2 Sales Danny Miller", and "DEP-3 SW-Development Kenny Dews". The "Employee" field has a dropdown menu open, showing five options: "EM-1 Toni Tester 1988-04-13", "EM-2 Mandy Json 1994-03-31", "EM-3 Bob Tale 1993-08-06", and "EM-5 Andy Anderson 2004-04-05". The "Department" field is marked with a small italicized (b) next to it, indicating a binding. The "Employee" field is marked with a small italicized (b) next to it, indicating a binding.

Do you see the little italic *(b)* next to the field "Department"? *This* show that there is a binding in place. Moving the mouse over the *(b)* will show the custom fields name.

Advanced Bindings

In addition to the normal binding option you can use more sophisticated Advanced Binding. Using the `getBoundValue()` function you can add any relativity field shown on the related edit screen to the JQL condition. This enables you to create multi-level cascaded bindings. Make sure not to use Bindings and advanced bindings for the same field at the same time.

JQL Binding Examples:

Configure : **SalesReps**

Headline*

Enter Headline to show in webpanel

Enter your JQL ☒

Auto Substituted Parameters: #currentIssue#, #currentProject#, #optionNotInSubtasks()#, getBoundValue(customfield_XXX)

jql=project = SalesReps and key in GetRelativityHaving('SalesManager', 'Regions=getBoundValue('Regions')')

Countries (b)

Regions (b)

SalesReps

For the project SalesReps retrieve all items having a SalesManager field and having `Regions=getBoundValue('Regions')`, where `getBoundValue('Regions')` will be replaced with the current screen value of the Regions Selection Field. In this example Region is bound to country and SalesReps (Tom Miller) is bound to Regions. You can specify a default value, which is replacing the binding value in case the binding is missing (not relevant) on the current screen. You can choose `#currentIssue#` in case you want to use the current issue key for the binding condition.

As you can see you can use any sophisticated JQL functions in here.


Info:

For bulk editing, all bindings will be disabled.
When creating JQL queries think about applying the "rules of demorgan's theorem".
This shows how you can implement logical XOR even with JQL.

Bound field configuration for Reverse Relativity

For Reverse Relativity you can choose a Relativity Custom Field which is bound. So if you set a custom field, all related issues in that custom field from the current showed issue will be displayed.

Selection fields

You can define how the Relativity Custom field is rendered. Simply select the fields you want to render. You can change the order by drag and drop. To delete just press the  delete icon.

Web-Panel fields

This works in the same way as the selection fields and is used for the web panel rendering. If there are no fields selected, no Web-Panel is rendered for this custom field.

Please note:

We recommend that you always include fields which always contain a value, such as keys. Otherwise, it is possible that identical or empty data fields are created.

Prepare

Installation

Automated: Add-ons in Marketplace

1. Open **Administration** drop down menu
2. Click on **Add-ons**
3. Find new add-ons
4. Search for "Relativity"

Manual: <https://confluence.atlassian.com/display/UPM/Installing+add-ons>

Upgrade

You've got a valid license? Hooray!

1. Open **Administration** drop down menu
2. Click on **Add-ons**
3. Manage add-ons
4. Search for **Relativity**
5. If Update is displayed press it

A rectangular button with a dark blue background and white text that reads "UPDATE AVAILABLE".A rectangular button with a blue background and white text that reads "Update".

License

Relativity for JIRA licenses can be purchased through the [Atlassian Marketplace](#).



After you bought you license follow following steps to apply:

1. Open **Administration** drop down menu
2. Click on **Add-ons**
3. Manage add-ons
4. Search for **Relativity**
5. Click on add-on entry
6. Copy-and-paste the license key into the license box and press update
7. Optional: Get cake!

For further informations see here:

<https://confluence.atlassian.com/display/jirakb/How+to+Update+Your+Add-on+License>

Supported Platforms

Key :  = Supported.  = Not Supported






Related Pages:

- [JIRA Supported platforms](#)

JIRA Version

JIRA  5.x  6.x  7.0.x- 7.5.x

Browsers

Microsoft Edge	
Microsoft Internet Explorer (Windows)	 IE8 and above supported
Mozilla Firefox (all platforms)	 Latest stable version supported
Safari (Mac)	 Latest stable version supported
Chrome (Windows and Mac)	 Latest stable version supported

FAQ & Troubleshooting

My custom field says: "Check license".

If you move your cursor above the lozenge, you can see a tooltip with the reason. If your license isn't valid then you won't be able to use Relativity. Please follow the license guide line.

My Web-Panel fields aren't rendered as expected.

Reload your page. If that does not help delete your browser cache.

When adding a field in relativity configuration changes will not become visible stored.

Make sure you pressed the "Add field" button for every field you have added. Finally click "save".

I have another question!

Just send an email to our [Service Desk](mailto:relativity_support@accxia.net) (relativity_support@accxia.net).