Jira Integration

Integrate with Jira to share tasks between Jira and Agiloft seamlessly. For example, if your support users manage tickets in Agiloft and pass them to developers using Jira, you can configure your system to easily send support tickets to Jira and back.

For example, consider a KB with a Jira Issues table. New issues are created, with a Pkey field left intentionally blank. When the system syncs with Jira, either manually or by rule automation, new issues are added to Jira and assigned Pkeys. The sync also sends the Pkey back to Agiloft, so after the sync, the records now include a value in the Pkey field that corresponds to Jira.

Prerequisites

Before you begin, create or identify a Jira administrator account to use with Agiloft, and have the Jira address ready.

Enable Jira Integration

When you enable Jira integration, five tables are automatically created in your system:

- Jira Issues
- Jira Issue Types
- Jira Priorities
- Jira Projects
- Jira Statuses

Each table correlates to the issues, issue types, priorities, projects, and statuses in Jira, respectively.

1. In your Agiloft knowledgebase, go to **Setup > Integration**.
2. Under Jira Integration, click **Deploy**.
3. Click **OK** in the warning that appears and wait for the tables to be created. When the tables are ready, the sync wizard opens automatically.
4. In the sync wizard, review the settings on the General tab and make changes as needed. Most settings are appropriate for Jira by default, but you might want to change the sync name or these integration settings:
    a. Directions. By default, the system both sends and receives data with Jira. If you need to only send or only receive data from Jira, select the appropriate option.
    b. Conflicts. By default, if Agiloft and Jira have conflicting information, the Jira information is used. You can choose instead to use the Agiloft information, the most recent information, or to duplicate the records.
5. Click **Next** to open the ESA Settings tab.
6. Complete the fields with the Jira address and login credentials.
    a. JIRA address: e.g. "https://[myjiralabel].atlassian.net/"

    b. Login: e.g. "mylogin@xyz.xom"
    c. Password: Jira no longer supports password authentication, so this field must be filled out with an API token generated in the Jira instance. Follow the instructions from Jira to generate an API token that you can paste into this Password field.
7. Click **Next** to open the Mapping tab.

Agiloft is automatically mapped to Jira using the five tables listed above: Jira Issues, Jira Issue Types, Jira Priorities, Jira Projects, and Jira Statuses. Records are matched by the ID field in each table, and sync is allowed to create and update records in both Agiloft and Jira. In the Jira Issues table, sync can also delete records in both systems. IDs are generated by Jira, and no saved search filters are used.

In most cases, this configuration is appropriate for Jira integration. If you need to modify any of the default behaviors, or if you want to review the specific field mapping, click **Edit Mapping** next to the table you need to modify and make the appropriate changes.

1. Make any necessary adjustments to the mappings and then click **Next** twice.
2. On the Running tab, specify how Jira sync can be initiated. By default, all sync options are allowed. You must have the By Actions (Rules/Workflow) option selected to use sync automation.
3. Click **Finish**.

Sync Automation

You can use a time-based rule to setup an automated sync process.

> ⚠ To automate the sync process this way, your Jira configuration must allow actions to run the sync. To check your setting, go to **Setup > Sync** and open your Jira configuration. Click **Next** until you reach the Running tab. Confirm that the By Actions (Rules/Workflow) option is selected.

To set up time-based sync automation:

1. Go to **Setup > Rules > New**.
2. In the Rule wizard, use these settings:
    a. On the General tab, enter a name and select a table.
    b. On the Rule Type tab, select At selected time intervals.
    c. On the Condition tab, select "Run once per scheduled time interval."
    d. On the Schedule tab, set Apply Rule to the appropriate time interval.
    e. On the Action tab, click the **Create Sync Action** button.
3. In the Sync Action wizard:
    a. Enter an action name.
    b. In the External System ID field, click the search icon to see a list of configurations. Select the Jira configuration.
    c. Click **Finish**.

4. Click **Finish**.

After that, the sync process will run based on the interval set on the Schedule tab.

The sync will operate for all tables mapped in the sync configuration, regardless of which table contains the rule. If you need to sync some tables separately, you will need to create a separate configuration for each table and use them in different sync actions. You should be careful with multiple Jira syncs that you do not create conflicts with existing mappings.