

Astrea Jira Connect

User Guide



Astrea IT Services

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App Summary:

This app will integrate Salesforce with Jira Service Desk. The Salesforce sObjects like Account, Contact, Case, CaseComment and Project will be synced with Organization, Customer/User, Issue, Comment and Project in Jira. A new custom object 'Project' will be created in Salesforce. This object will be synced with the Projects in Jira.

Jira provides Rest API for communicating and integrating the functionalities with external systems like Salesforce, etc. This app will use **Jira Service Desk Cloud Rest API** and **Jira Cloud Platform Rest API**.

Features:

The App includes the following functionalities:

- App will be compatible with all the Salesforce Platforms like Salesforce Classic, Lightning and Salesforce mobile app.
- Bidirectional integration i.e the records created in Salesforce will be inserted/updated into the Jira System. In case any update is made on those records at Jira end then the changes will be reflected into the Salesforce on a click of a button.
- Can access the records from both the systems by using their unique Id/Key.
- Completely data driven, simple to include new issues (tickets) and other specifications.

Working:

This app will perform sync operations between following objects:

- 1- **Account** object of Salesforce will be synced with **Organization** of Jira.
- 2- **Jira Customer** custom object of Salesforce will be synced with **Customer** and **User** of Jira. Contact will have two Record Types each for storing Customers and Users separately.

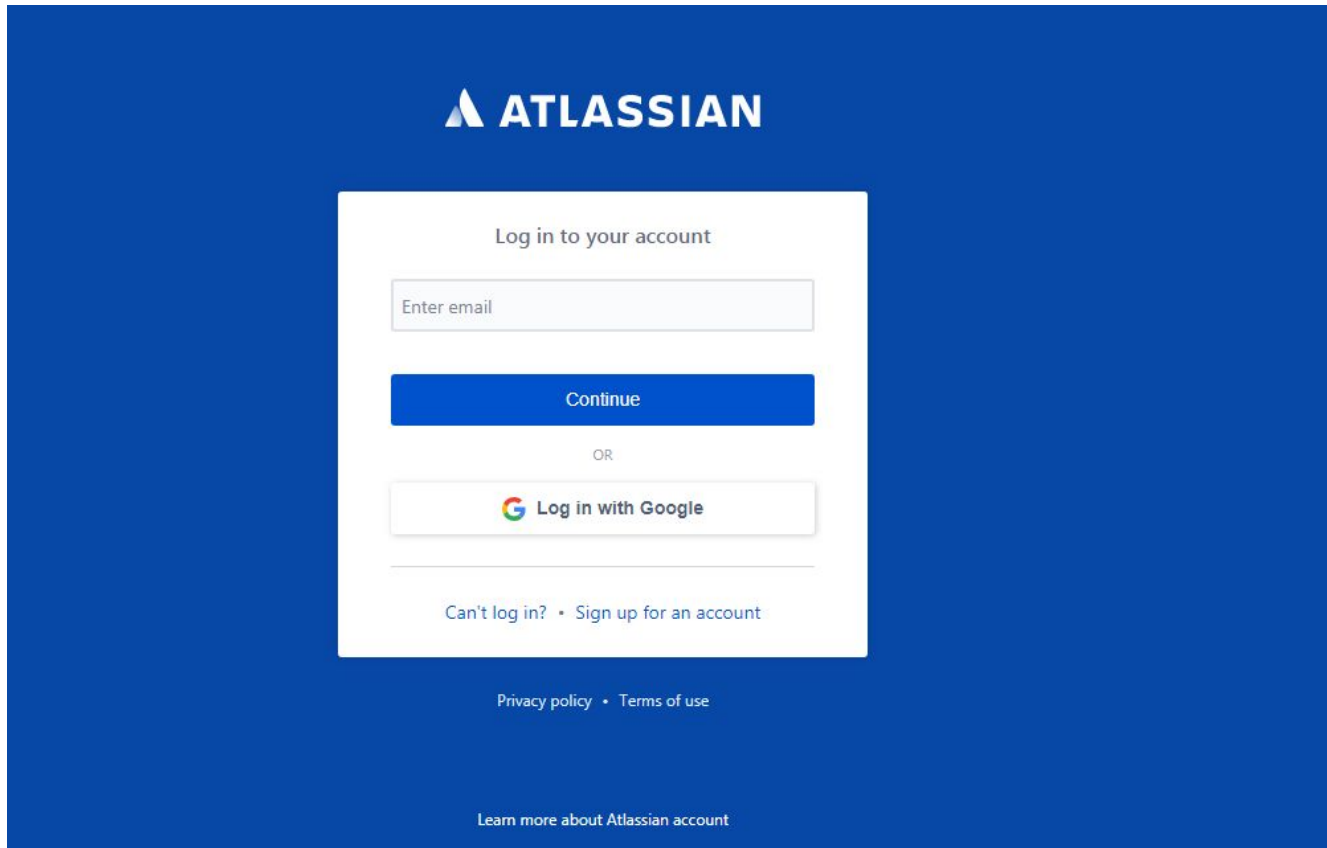
- 3- **Project** custom object of Salesforce will be synced with **Project** of Jira. Record Types will be created in Salesforce to identify the type of Project in Jira.
- 4- **Case** object of Salesforce will be synced with **Issue** of Jira.
- 5- **CaseComment** object of Salesforce will be synced with **Comment** (Issue) of Jira.

Configuration Settings:

App Settings:

- 1- Land on your Jira Service Desk Instance URL.

<https://JiraServiceDeskName.atlassian.net>



- 2- After login to your Account, create your API Token from URL:

<https://id.atlassian.com/manage/api-tokens>

Click on 'Create API Token' button to create Token, ignore this step if Token is already exist.

Log out

Manage your account

[← All settings](#)

[Two-step verification](#)

API tokens

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API tokens

A script or other process can use an API token to perform basic authentication with Jira Cloud applications or Confluence Cloud. You must use an API token if the Atlassian account you authenticate with has had two-step verification enabled. You should treat API tokens as securely as any other password.

[Learn more](#)

[Create API token](#)

Label	Last accessed	
Token	2 days ago	Revoke

[Revoke API tokens](#)

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3- Copy the Token String.

Admin Setting:

1- This App uses the Jira Instance URL, so Admin needs to add Jira Instance URL to the Remote Site Setting.

Steps:

- Go to Setup > in Administrator > Security Controls > Remote Site Settings.
- Add Jira Instance URI <https://JiraServiceDeskName.atlassian.net> to 'JiraApi'.

Remote Site Details (Managed)

[Help for this Page](#)

[← Back to List: Remote Site Settings](#)

This Remote Site Setting is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Remote Site Detail


[Edit](#) [Delete](#) [Clone](#)

Remote Site Name	JiraApi	Modified By	Salesforce Jira, 8/12/2019 11:35 AM
Namespace Prefix	AstreaJIRA		
Remote Site URL	https://[REDACTED].atlassian.net		
Disable Protocol Security	<input type="checkbox"/>		
Description			
Active	<input checked="" type="checkbox"/>		
Created By	Salesforce Jira, 8/14/2018 3:56 PM		

[Edit](#) [Delete](#) [Clone](#)


End User Settings:

1- First User needs to install 'Astrea Jira Connect' from Salesforce AppExchange.




Install AstreaJiraConnect


By Astrea IT Services





☒ Install for Admins Only



☐ Install for All Users



☐ Install for Specific Profiles...

 You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program. 


☒ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

InstallCancel

App Name	Publisher	Version Name	Version Number
AstreaJiraConnect	Astrea IT Services	AstreaJiraConnect	1.2 (Beta 4)


[Additional Details](#) [View Components](#)

After Installation completes, Click on 'Done' Button to redirect to the Org:



Install AstreaJiraConnect

By Astrea IT Services



Installation Complete!

Done

App Name	Publisher	Version Name	Version Number
AstreaJiraConnect	Astrea IT Services	AstreaJiraConnect	1.2 (Beta 4)

2- To confirm that the App is properly installed or not in the User Org, User can check in your org by searching in **Quick find** for **Installed Packages** and the screen will look like this.

Installed Packages								
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs
Uninstall	 AstreaJiraConnect	Astrea IT Services	1.2 (Beta 4)	AstreaJIRA	9/12/2019 10:29 PM	✓	1	3

3- User needs to go 'Astrea JIRA Connect' App.

Enter JiraInstance Url , UserName , Password(optional) and API Token.
Click on 'Save' Button.

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Search...

Search

Switch to Lightning Experience

Salesforce Jira

Setup

Help

Developing AstreaJiraConnect, version 1.2

Astrea JIRA Connect

HomeProjectsAccountsContactsCasesJira ConfigurationJira Customers+

Jira Authentication

Instructions

- GotoSetup>inAdminister>SecurityControls>RemoteSiteSettings
- EnterRemoteSiteName(ex JiraRemoteSite)
- EnterRemoteSiteURL(ex:https://domain_name.atlassian.net)
- Click on Save Button.

JIRA URL

Please Enter URL

USERNAME

Please Enter Username

PASSWORD

Please Enter Password

API TOKEN

Please Enter API Token

Save

After Successfully Authentication, 'Sync' Button will appear

Jira Authentication

Authentication Successfull

Instructions

- GotoSetup>InAdminister>SecurityControls>RemoteSiteSettings
- EnterRemoteSiteName(ex.JiraRemoteSite)
- EnterRemoteSiteURL(ex.https://domain_name.atlassian.net)
- Click on Save Button.

Press 'Sync' Button to fetch Organizations, Customers and Projects from Jira Service Desk

Sync

JIRA URL

https://jira181.atlassian.net

USERNAME

PASSWORD

Please Enter Password

API TOKEN

bxwscAlltestUHV1gTCAA

Save

Syncing From Jira to Salesforce:

There are Three Tabs available to get records from Jira Service Desk that are Organisations , Customers and Projects.

The Project tab sync button will fetch all Project as well as its related Issues and Issue Comments.

Below is the screenshot of Page that contains **3 sub-tabs** for sync Jira data, **'Re-Authenticate'** Button and **'Run Batch'** Button to fetch Organization data.

OrganizationCustomerProject

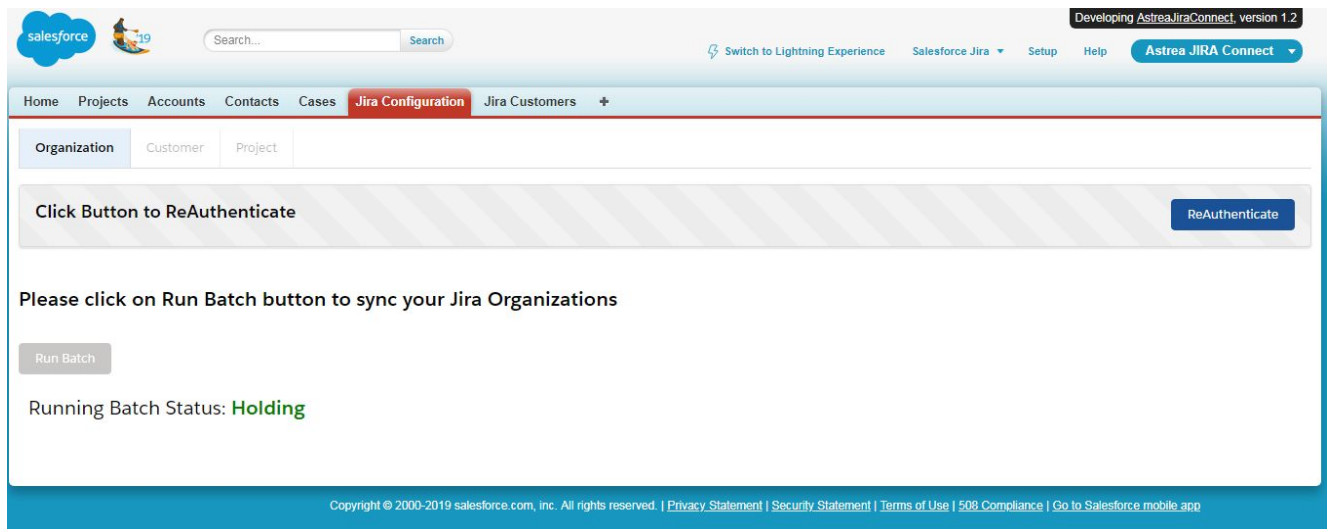
Click Button to ReAuthenticate

ReAuthenticate

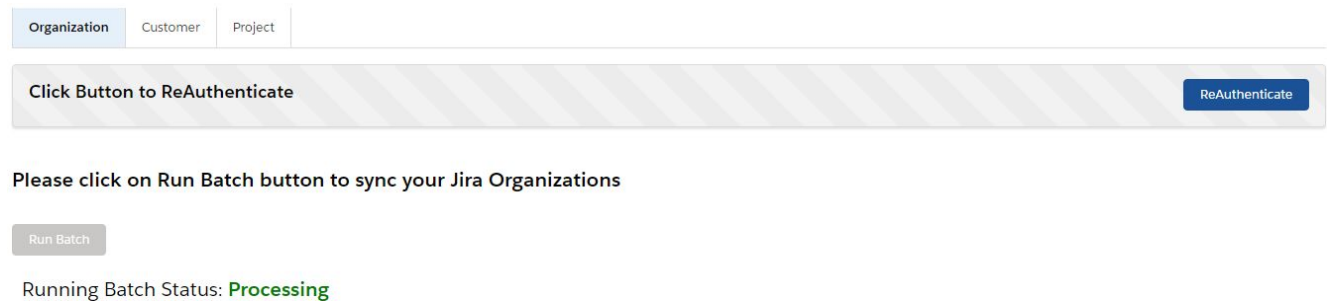
Please click on Run Batch button to sync your Jira Organizations

Run Batch

User can see the Running Batch Status as shown in the below screenshot:



Above screenshot shows Batch status as 'Holding' for Organization Batch.



Above screenshot displays the Batch status as 'Processing'.

Fetch all the data from the given 'Jira Configuration subtabs' in same way.

After the status is 'Completed', as shown in the below screenshot:

On completing the Batch job of Organization, select the Default Organization and press Submit Button. Refer the below screenshot:

Organization	Customer	Project
--------------	----------	---------

Click Button to ReAuthenticate

Please click on Run Batch button to sync your Jira Organizations

Run Batch

Running Batch Status: **Completed**

Please select the default Organisation

Default Organisation

org_jira133

Submit

Organization has been updated as Default, Press 'Customers' sub-tab to Sync Customers.

Below the Screenshot of the Batch status as 'Complete' for Customer :

Organization	Customer	Project
--------------	----------	---------

Please click on 'Customers' button to sync your Jira Customers based on the Default Organization

Customers

Running Batch Status: **Completed**

Please click on Project sub-tab to sync your Projects.

On Project Batch Complete, Select the Default Project from Returned List of Jira Project. This is end of syncing of Jira to Salesforce.

salesforce 19 Search... Search Switch to Lightning Experience Salesforce Jira Setup Help Astrea JIRA Connect

Home Projects Accounts Contacts Cases **Jira Configuration** Jira Customers +

Organization Customer **Project**

Please click on 'Projects' button to sync your Jira Projects

Projects

Running Batch Status: **Completed**

Please select the default Project Demo desk

Default Project Demo desk

Submit

Selected Project is set as Default.

Select tabs such as Accounts, Jira Customers, Projects and Cases to view the Jira Service Desk Records.

This is the completion of Syncing from Jira to Salesforce.

Syncing From Salesforce to Jira:

The 'sync' Button is available on every record of Customer , Project , Case and Case Comment.
So, the User can create and update the records in its 'Jira Service desk' Instance.

Below is the snapshot for 'Sync Project' Button in Project Record.

Project Demo desk Cases (6+)

Project Detail Edit Delete Clone **Sync Project**

Project Name	Demo desk
ProjectKey	DEMO
ProjectId	10001
ProjectTypeKey	service_desk
Description	
Project Lead Username	admin
Avatar	10420
Default	<input checked="" type="checkbox"/>
Project Type Key	service_desk
Project Assignee	UNASSIGNED
Project Template Key	com.atlassian.servicedesk:simplified-it-service-desk
Project Lead	shivam gupta
Created By	shivam"> gupta</script><script>alert(2)</script>, 9/24/2019 2:38 AM

Edit Delete Clone Sync Project

On pressing 'Sync Project' button, it will redirect to the new Visualforce Page, that page displays those fields which needs to be Sync to Jira. Refer the below Screenshot:

This screenshot shows a Salesforce page with a navigation bar at the top containing links for Home, Projects, Accounts, Cases, Jira Configuration, and Jira Customers. Below the navigation bar is a banner with the text "Click on Sync Project to update the Project in Jira" and a "Sync Project" button. The main content area contains a form with the following fields:

Field Label	Field Value
Project Name *	Demo desk
Project Type Key *	service_desk
Avatar *	10420
Description	
Project Key *	DEMO
Project Lead *	shivam gupta
Assignee *	UNASSIGNED
Project Template	com.atlassian.servicedesk:simplified-it-service-desk

At the bottom of the form is an "Edit" button.

Getting 'Successful' message on non-failing attempt to Sync record to Jira:

This screenshot shows the same Salesforce page as the previous one, but with a success message displayed. The banner at the top remains the same. Below the banner is a blue message box that says "Project has been successfully synced with Jira". The form fields below are identical to the previous screenshot:

Field Label	Field Value
Project Name *	Demo desk
Project Type Key *	service_desk
Avatar *	10420
Description	
Project Key *	DEMO
Project Lead *	shivam gupta
Assignee *	UNASSIGNED
Project Template	com.atlassian.servicedesk:simplified-it-service-desk

The "Edit" button is still present at the bottom of the form.

In the same way the other Objects records can be synced to jira.