## Jira integration guide

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## Integrations

## Jira integration guide

## Jira Align and Jira integration overview

The *Jira Integration Guide* provides information on how to connect Jira to Jira Align to synchronize data and start using the advanced Jira Align functionality. The guide is intended primarily for the Jira system administrators who set up the tool integration, in conjunction with your Jira Align Solutions Architect.

## Jira data synchronization

Data is mapped automatically between Jira and Jira Align during the synchronization process. In the event of Jira downtime, the Jira connector determines the last time a Jira project key and issue type combination was triggered and defines a lookback timer for each project and issue type. The connector then updates or creates work items in Jira Align based on all corresponding Jira issues so that no cleanup is needed.





Jira		Capabilities
Epics	Name - Description - Owner	Features
		Program Increments
Fix Versions	Name - Description Start Date - End Date	Release Vehicles
Sprints	Name - End Date	Sync Sprints Programs
Stories	Name - Description - Points - Owner	Stories
Projects/Boards	Team Name	Teams
Users	First Name - Last Name - Email	Users

Jira Project becomes Jira Align Program Backlog

All work items from the Jira Project are mapped to a Program in Jira Align. One or more Jira Projects may be mapped to the same program in Jira Align, thereby creating a complete program backlog of all work items for a train.

Jira Agile Board becomes Jira Align Team						
Create			Update			
Field	JA to Jira	Jira to JA	JA to Jira	Jira to JA		
Name		Yes				

Jira User becomes Jira Align User						
	Create		Update			
Field	JA to Jira	Jira to JA	JA to Jira	Jira to JA		
First Name		Yes		Yes		
Last Name		Yes		Yes		
Email		Yes		Yes		
Assigned Team	Yes	Yes	Yes	Yes		
Assigned Sprint		Yes		Yes		

#### Additional notes on user synchronization:

- Updating user information doesn't occur automatically, but is supported using the <u>Pull Jira User Data</u> process.
- Jira users are created in Jira Align when they own work items within Jira projects mapped to an Jira Align program. If the work item is assigned to a sprint in Jira and the Jira Align setting **Allow Jira to add users to team if they belong to an issue** is set to **Yes**, the user will also be assigned to a team in Jira Align. If those two conditions are not met, the user will be created but not assigned to a team.
- If users are already assigned to an Agile team with a selected role in Jira Align, they will be assigned to that role on the Jira Align sprint's **Members** tab. If users are not already assigned to a team, they will be assigned to the team and sprint with the default role for the environment set in Jira Align on the **Jira** Setup tab of the <u>Jira Settings</u> page.

Jira Fix Version becomes Release Vehicle in Jira Align					
Field	Create		Update		
Field	JA to Jira	Jira to JA	JA to Jira	Jira to JA	
Name	Yes	Yes	No	Yes	
Start Date	Yes	Yes	Yes	Yes	
End Date	Yes	Yes	Yes	Yes	
Status*	Yes	Yes	Yes	Yes	
Health	Yes	Yes	Yes	Yes	

#### Additional notes on release vehicle synchronization:

• The Jira Align release vehicle to Jira fix version sync does not remove fix versions from Jira Issues (epics, stories, and bugs), it only adds them.

\* Fix version to release vehicle Status field sync:

- Jira projects are associated with Jira Align programs. Jira fix versions are associated with Jira projects. Jira Align will associate a newly created release vehicle to the Jira Align program increment whose start date and end date range contains the Jira fix version's release date.
- Jira fix versions will not sync with Jira Align if their release date is not populated and the release date does not fall within the start date and end date of an associated program increment.
- Start dates are synced when a fix version is created.
- A release vehicle's release date is synced to the fix version's ship date.
- A release vehicle is set to Launched when a fix version is set to Released.
- The Jira Align Go Live Date is removed when a fix version is set to Unreleased.
- The release vehicle state is set to In Progress when a fix version is set to Unreleased.
- The release vehicle state is set to **Archived** and health is set to **Complete** when a fix version is set to **Archived**. However, you cannot archive a release vehicle in Jira Align.
- The order in which Jira fix versions sync with Jira Align release vehicles and work items sync to Jira Align will be important. If a Jira issue syncs to a Jira Align work item before the Jira fix version to Jira Align release vehicle sync occurs, there will need to be a subsequent update to the issue in Jira or a JQL Query ran in Jira Align against the issue(s) in order to populate the fix version. For this reason, it is recommended to set the release date on Jira fix versions before associating a fix version with issues.

Release vehicle to fix version sync (on initial creation):

- On the release vehicle create screen, a selection of a program increment associated with a Jira Align program that is associated with a Jira project will render a Jira Project field on the release vehicle. This field is only accessible on the release vehicle create screen and will create a corresponding fix version in Jira when selected.
- A fix version is set to Released when a release vehicle is set to Launched.
- A fix version's release date is set to today's date when a release vehicle is set to Launched.
- A fix version is set to Unreleased when a release vehicle is set to In Progress or Not Started.

Jira Sprint becomes Sprint in Jira Align					
Field	Create		Update		
rielu	JA to Jira	Jira to JA	JA to Jira	Jira to JA	
Name		Yes		Yes	
End Date		Yes		Yes	
Goal		Yes		Yes	

Jira Epic becomes Feature in Jira Align					
	Create		Update		
	JA to Jira	Jira to JA	JA to Jira	Jira to JA	Notes
Field					

Name	Yes	Yes	Yes	Yes	The Jira Cloud <b>Epic</b> <b>Name</b> field syncs with the <b>Jira Align</b> <b>Jira Epic Name</b> custom field. In Jira Server or Data Center, the <b>Epic</b> <b>Name</b> field syncs with the Jira Align feature's <b>Title</b> field.
Summary	Yes	Yes	Yes	Yes	
Description	Yes	Yes	Yes	Yes	The field supports a rich text editor. Rich text editor support between Jira Align and Jira Server or Data Center works with HTML plug-ins only and will not work with plug-ins that use a customized wiki markup. In addition, the mapped Jira fields must be configured to use the plugin's render. Rich text editor support is not currently supported with Jira Cloud (users must sync plain text).
Estimate (Points)	Yes	Yes	Yes	Yes	
Parent Work Item (Epic or Capability)	Yes	No	Yes	No	

Acceptance Criteria	Yes	Yes	Yes	Yes	The field supports a rich text editor. Rich text editor support between Jira Align and Jira Server or Data Center works with HTML plug-ins only and will not work with plug-ins that use a customized wiki markup. In addition, the mapped Jira fields must be configured to use the plugin's render. Rich text editor support is not currently supported with Jira Cloud (users must sync plain text).
Owner (Jira Assignee)	Yes	Yes	Yes	Yes	The following applies when you consolidated the <b>Create</b> and <b>Edit</b> Jira screens. If the Jira Align <b>Owner</b> field is populated but the <b>Reporter</b> field does not exist in Jira, the sync will fail. If the <b>Reporter</b> field does not exist in Jira and the Jira Align <b>Owner</b> field is not populated, the sync will be successful because the connector skips the mapping.
Status	Yes	Yes	Yes	Yes	The comments section in Jira is updated with details and the issue is transitioned



Program Increment	Yes	Yes	Yes	Yes	Applied from Jira Fix Version
Tags	Yes	Yes	Yes	Yes	Spaces in tags are replaced with an underscore as Jira labels do not support spaces. The tags with a "j:" prefix in Jira Align are generated by the Jira connector by default. These are tags for the issue key, fix version name, and sprint name. Tags with a "j:" prefix will not sync from Jira Align to Jira.
Blocked	Yes	Yes	Yes	Yes	
Business driver	Yes	Yes	Yes	Yes	
Capitalized	Yes	Yes	Yes	Yes	
Category	Yes	Yes	Yes	Yes	
Туре	Yes	Yes	Yes	Yes	
Priority	Yes	Yes	Yes	Yes	
Custom text input fields	Yes	Yes	Yes	Yes	
Custom single-select dropdown fields	Yes	Yes	Yes	Yes	

#### Additional notes on feature synchronization:

• If a feature is pushed to multiple Jira projects from Jira Align, then the fields on the feature synchronize one way from Jira Align to Jira, with the exception that child stories assigned to the Jira epic will still roll up to the same feature in Jira Align.

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Jira Story and Configured Custom Issue Types become Stories in Jira Align						
Field	Create Update					
	JA to Jira	Jira to JA	JA to Jira	Jira to JA	Notes	
Name (Jira Summary)	Yes	Yes	Yes	Yes		
Description	Yes	Yes	Yes	Yes	The field supports a rich text editor. Rich text editor support between Jira Align and Jira works with HTML plug-ins only and will not work with plug-ins that use a customized wiki markup.	

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Estimate (Points)	Yes	Yes	Yes	Yes	Points from Jira are visible and can be used when synced from Jira even if the particular Points value is not available in Jira Align. For estimating stories, Jira Align uses Modified Fibonacci or Power of Two. The point values from Jira are converted to time (Team Weeks or Member Weeks) according to the Estimation Conversions settings. If you change the Jira- specific points value to a different value in Jira Align, the Jira-specific point value will disappear as an option from the Effort Points drop- down menu. All changes are saved in the audit log.
Assigned Team	Yes	Yes	Yes	Yes	
Assigned Sprint	Yes	Yes	Yes	Yes	
Parent Feature	Yes	Yes	Yes	Yes	

Acceptance Criteria	Yes	Yes	Yes	Yes	The field supports a rich text editor. Rich text editor support between Jira Align and Jira works with HTML plug-ins only and will not work with plug-ins that use a customized wiki markup.
Assigned (Jira Assignee)	Yes	Yes	Yes	Yes	
Status	Yes	Yes	Yes	Yes	The comments section in Jira is updated with details and the issue is transitioned
Release Vehicle	Yes	Yes	Yes	Yes	
Program Increment	No	Yes	No	Yes	Applied from Jira Fix Version with the latest date; sprint overrides if conflict
Туре		Yes		N/A	Set to a configured value for custom issue types

Jira Sub-Task or Task becomes Task under Jira Align Story Create Update Field JA to Jira Jira to JA JA to Jira Jira to JA Name (Jira Summary) Yes Yes Yes Yes Description Yes Yes Yes Yes **Estimate (Hours)** Yes Yes Yes Yes **Hours Spent** Yes Yes Assigned Yes Yes Yes Yes Status Yes Yes **Parent Story** Yes Yes

#### Additional notes on task synchronization:

- Users may choose to map either Tasks or Sub-Tasks from Jira to become Jira Align Tasks. Traditionally
  our customers map Sub-Tasks from Jira to the Jira Align Task. If Jira Tasks are to be mapped to Jira
  Align Tasks a custom link that connects the Jira Stories to the Jira Sub-Tasks will need to be configured
  under Jira Align Admin > Jira Settings > Manage Custom Fields. If customers choose to not map Jira
  Tasks to Jira Align Tasks they will still have the option of mapping Jira Tasks to Jira Align Stories of Type
  Task.
- If sub-tasks exist in Jira and are parented to a story that syncs to Jira Align, all of the sub-tasks will sync to Jira Align, regardless of whether task synchronization has been configured in <u>Jira Settings</u>. This is to support roll-up reporting of the stories.
- Configuring task synchronization in <u>Jira Settings</u> identifies the sub-task issue type for tasks to be created in Jira as (when tasks are created in Jira Align and then sync to Jira).
- If a story has time logged against it in Jira, Jira Align will automatically create a child task on the corresponding Jira Align story with the same name as the Jira story, regardless of if task synchronization has been configured. This is to support roll-up reporting of the stories.

#### Jira Bug becomes Defect in Jira Align Create Update Field JA to Jira to JA to Jira to Notes JA JA Jira Jira Name (Jira Summary) Yes Yes Yes Yes The field supports a rich text editor. Rich text editor support between Jira Align and Jira Description Yes Yes Yes Yes works with HTML plug-ins only and will not work with plug-ins that use a customized wiki markup.

Estimate (Points)	Yes	Yes	Yes	Yes	Points from Jira are visible and can be used when synced from Jira even if the particular Points value is not available in Jira Align. For estimating stories, Jira Align uses Modified Fibonacci or Power of Two. The point values from Jira are converted to time (Team Weeks or Member Weeks) according to the <u>Estimation</u> <u>Conversions</u> <u>settings</u> . If you change the Jira- specific points value to a different value in Jira Align, the Jira-specific point value will disappear as an option from the Effort Points drop- down menu. All changes are saved in the audit log.
Assigned Team	Yes	Yes	Yes	Yes	
Assigned Sprint	Yes	Yes	Yes	Yes	
Assigned (Jira Assignee)	Yes	Yes	Yes	Yes	

Priority	Yes	Yes	Yes	Yes	Priority can be mapped through <u>Manage Custom</u> <u>Fields</u> . If a priority value is not mapped, and then synced from Jira, Jira Align will set the priority to <b>Normal</b> .
Status	Yes	Yes	Yes	Yes	
State	Yes	Yes	Yes	Yes	
Release Vehicle	Yes	Yes	Yes	Yes	Syncs with fix version in Jira
Tags	Yes	Yes	Yes	Yes	Spaces in tags are replaced with an underscore as Jira labels do not support spaces. The tags with a "j:" prefix in Jira Align are generated by the Jira connector by default. These are tags for the issue key, fix version name, and sprint name. Tags with a "j:" prefix will not sync from Jira Align to Jira.
Program Increment	No	Yes	No	Yes	Applied from Jira Fix Version with the latest date; sprint overrides if conflict

## Jira integration prerequisites

#### Supported Jira versions

The connector supports all Atlassian-supported Jira versions. See the <u>Atlassian Support End of Life Policy</u> for a full list of supported Jira versions.

#### Jira server information

Question	Answer
1. Is your Jira instance accessible over the Internet? (*see below if No)	Yes/No
2. Does the Jira server have a publicly trusted SSL certificate? (https) (**see below if No)	Yes/No
3. What is the URL to access Jira?	Fill in the URL

\* If both Jira and Jira Align are planned to be on site behind the firewall, then a VPN access for both the Jira Align engineer and the solutions architect is required. If no VPN access is provided to the Jira Align team, there is an additional license fee.

\*\* You must obtain a publicly trusted SSL certificate from a certificate provider and install it on the Jira Server.

#### Jira user and project prerequisites

1. Create a Jira user specifically for the integration process and provide the user name and password to your assigned solutions architect. The user must have the following <u>project permissions</u> on all Jira projects that you plan to synchronize to Jira Align:



- Administer projects
- Browse projects
- Manage sprints
- Assignable user
- Assign issues
- Close issues
- Create issues
- Edit issues
- Link issues
- Modify reporter (if you consolidated the Create and Edit Jira screens)
- Resolve issues
- Schedule issues
- Transition issues
- Add comments

Additionally, the user must have the Browse Users and Groups global permission enabled in Jira.

**Note:** If your Jira instance includes users in languages other than English, ensure that your Jira service user's <u>language setting</u> is set to English (US or UK) in Jira, and do not use Jira user <u>translations</u> for issue type field values so that they match the default Jira issue type names (Epic, Story, etc.)

2. Ensure that each Jira project and its issues meet the following criteria:

- Both the **Create Issue** and **Edit Issue** screens have the **Jira Story Points** field editable by the Jira Align user account.
  - Note: A Story Points field must be enabled for the Epic issue type in Jira Projects you connect to if the Enable Feature Point Sync setting is set to Yes in Jira Align. <u>This setting</u> controls the sync of points from Jira Align features to Jira epics, and syncs will fail if a field is not found in Jira. Because Jira Align converts an entered estimate into <u>all three available estimation systems</u>, syncing will always send a points value to Jira when the setting is enabled.
- When a work item's state changes, the Jira workflow is configured to only require a reason for changing the state and no other fields are required. This is needed for the proper bidirectional syncing of state for stories and features (epics in Jira).
- To ensure project-specific mappings are correct, refer to the Jira API call below. Jira Administrators, replace "mycompany.atlasssian.net" with the URL for your Jira instance and replace "CON-79" issue key with an issue key ID from the project(s) that will be integrated with Jira Align.

https://mycompany.atlassian.net/rest/api/latest/issue/CON-79/transitions?expand=transitions.fields

#### Jira Data Center prerequisites

If you're using Jira Data Center with your Jira connector, the <u>Jira application setting</u> for **User email visibility** must be set to **PUBLIC** or **LOGGED IN USERS ONLY**.

#### **API URLs for Jira connector**

These are the four API-based wildcard endpoints that the Jira connector requires.



/rest/auth/\*

/rest/api/2/\*

/rest/agile/1.0/\*

/rest/greenhopper/1.0/\*

The documentation for the above APIs can be found here: https://docs.atlassian.com/jira-software/REST/server/

https://docs.atlassian.com/jira-software/REST/cloud/

#### Jira two-way SSL authentication

With two-way SSL authentication, you can validate that the Jira requests are both encrypted and coming from a guaranteed source. Two-way SSL authentication works as shown on the image below: the SSL client application (A) verifies the identity of the SSL server application (B), and then the SSL server application verifies the identity of the SSL-client application.



#### Firewall (logical or physical)

- Connections are always initiated by Jira Align.
- All requests are over SSL/TLS port defined by your side.

#### Authentication

- The layer 5 does authentication of parties using the SSL handshake request as part of the mutual certificate validation process.
- There should be no authentication at the API gateway tier.
  - This authentication would be redundant with mutual certificate process, thus adding another layer of potential breakage.
  - Adding two authentication processes would be very complex and is not currently supported in our software solution.
- The Jira tier does the authentication per your recommended Jira authentication process to match your version of the Jira application.

#### Encryption

• The Jira Connector only supports TLS v1.2 for SSL communication.

#### **REST API Support**

- Our solution requires access to the full suite of REST verbs such as GET, POST, PUT, and DELETE.
- Our solution also requires access to the entire Jira REST API.
  - GET /rest\*\*
  - POST /rest\*\*
  - DELETE /rest\*\*
  - PUT /rest\*\*

Note: These are strict requirements because our application cannot support a subset of these.

#### Certificates

- We typically use our \*.jiraalign.com certificate for the validation process.
- If you require a certificate defined within a pre-approved domain, we can generate a CSR on behalf of your domain and use this for the Jira connector.

Two-way SSL authentication is known as client authentication or mutual authentication because the SSL client application sends its certificate to the SSL server once the SSL server has authenticated itself to the SSL client.



#### Jira Connector Security

To establish an encrypted channel using the certificate-based two-way SSL:

- 1. A client requests access to a protected resource.
- 2. The server sends its certificate to the client.
- 3. The client verifies the server's certificate.
- 4. In case of success, the client sends its certificate to the server.
- 5. The server verifies the client's credentials.
- 6. In case of success, the protected resource requested by the client receives access from the server.

From the server side view, if the client shows a certificate and uses the private key as part of a CertificateVerify message and the server validates the client certificate with regards to a set of trust anchors which does not include a hostile or incompetent root certificate authority (CA), then the server has a guarantee that it is addressing the right client. The guarantee holds for all subsequent data within the connection.

If SSL with mutual client-server authentication is used, the attacker will need to plant rogue CA both in the client and the server to conduct a successful man-in-the-middle (MitM).

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SSL vs. VPN for secure communications					
Why not VPN?	Why SSL?				
No association to any specific application.	SSL is a common protocol and most web stacks have SSL capabilities built in.				
The client computer with IPSec VPN is virtually a full member of the corporate network and is able to see and potentially access the entire network.	<ul> <li>SSL allows more precise access control:</li> <li>Tunnels to specific applications rather than to the entire corporate LAN.</li> <li>The REST requests over the SSL connections can only access the applications they are configured to access rather than the whole network.</li> </ul>				
IPSec VPN solutions cannot operate without third-party hardware and/or software.	When combined with application authentication and authorization, the solution has more granular control access.				
The client software on all remote machines needs to be maintained.	Direct access to the web-enabled SSL applications guarantees no access to network resources such as printers or centralized storage and users cannot use the VPN for file sharing or backups.				

Authentication workflow	
Customer to provide	Jira Align to provide
<ul> <li>A URL for the Jira server, for example, <u>https://jira.customername.com/restapi</u></li> <li>A proxy user account on the Jira server with which the Jira Align REST API will authenticate.</li> <li>A test Jira server to validate connection protocols.</li> </ul>	<ul> <li>Public Key of the Jira connector client which will attempt a request to a URL.</li> </ul>

To identify roles:

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- 1. Identify a security/network level owner of Jira and security device in the client data center (Jira Sec).
- 2. Identify a Jira user account manager (Jira Mgr).
- 3. Identify a Jira Align administrator (Jira Align Admin).
- 4. Identify a Jira Align Ops (Jira Align Ops).

To set up public key exchange and security device configuration:

- 1. Jira Align Ops sends public keys in a secure way to the Jira Sec.
- 2. Jira Sec configures \*.jiraalign.com keys in their mutual TLS certificate management solution.
- 3. Jira Sec connects a test Jira server to an external network.
- 4. Jira Sec validates public Internet connectivity.
- 5. Jira Sec enables Jira REST API to pass through a security device. Note that Jira Align requires all REST verbs and access to the full Jira API set.

For example in APIGEE, the rule configuration looks like this:

- GET /rest\*\*
- POST /rest\*\*
- DELETE /rest\*\*
- PUT /rest\*\*

Note: In the Azure API Gateway, the public key must be all caps.

To create a Jira application proxy account:

- 1. Jira Mgr creates proxy accounts for the Jira connector in Jira Align production and test environments.
- 2. Jira Mgr sends proxy information to Jira Align Ops in a secure way.
- 3. Jira Mgr determines the application-level authentication protocol for REST API requests from {Oauth, Cookie}.

Jira to Jira Align Rest API validation – Test Environment:

- 1. Jira correlates the URL of the test server to the work performed by the Jira Align Admin.
- 2. Jira sends the URL to the Jira Align Ops and Jira Align Admin.
- 3. Jira Align Admin selects and configures Jira in Jira Align administration user interface.
- 4. Jira Align Admin reviews sync success or failure in UI.
- 5. Jira Align Ops reviews connector Jira logs on the Jira Align test server.
- 6. Jira validates the request is received at the security device tier.
- 7. Jira validates the request is received at the Jira Rest server tier.

To set up production configuration:

- 1. Jira Align Ops finalizes production site and servers for operational readiness.
- 2. Jira Sec, Jira Mgr, Jira Align Admin, and Jira Align Ops repeat all steps from the **Jira to Jira Align Res API validation – Test Environment** procedure.
- 3. Jira Align Ops performs database transfer from the test site to production.

## Jira integration data collection

Ensure you have completed all steps in <u>Jira integration prerequisites</u> before proceeding. **Note:** You can download an Excel spreadsheet of all of the tables in this article <u>here</u>.

#### Jira projects and boards

1. Create a list of Jira Project Keys and Jira Project Names that you plan to synchronize to Jira Align. Determine to which Program/Release Train each Jira project maps. Please note each Jira Project can only be mapped to one Jira Align Program due to the Jira Align data model which associates Jira Projects to Jira Align Programs.

To find a Jira Project Key:

When logged into Jira, select your project, and then look at the URL. In the URL, you can find the Project Key: <a href="https://your\_jira\_name.net/projects/PROJECTKEY/">https://your\_jira\_name.net/projects/PROJECTKEY/</a>

$\leftarrow$	C 🔒 🤅	Secure   https://a	gilec.atlassian	.net/projects	s/ <mark>DON</mark> /issues/l	DON-56?fil	lter=allopenissues
≡	₩JIRA	Dashboards -	Projects -	Issues -	Boards -	Create	

Project Key	Project Name	Program/Release Train Name
(e.g. MDP)	(e.g.) Mobile Delivery Platform	(e.g. Mobile Release Train)



2. For each project above, create a list of Jira Agile Board IDs, which are in the URL for the board, that you plar to synchronize to Jira Align (for example, RapidView=38). Determine to which Program in Jira Align each Jira board will map and specify a friendly name for the Team to create.

To find a Jira RapidView ID:

When logged into Jira, select your project, and then go to Board/Backlog/Sprints (or select your board from the board list). Next, look at the URL to find the RapidView ID:

$\leftrightarrow$	CD	nttps://agilec.atlas	sian.net/secu	re/RapidBoa	rd.jspa?rapidV	/iew= <mark>123</mark>
≡	ŸJIRA	Dashboards -	Projects -	Issues -	Boards -	Create

Board ID	Team Name	Program
(e.g. 123)	(e.g. Superheroes)	(e.g. Mobile Release Train)

3. If you use a filter to determine what issues appear on the Backlog portion of the Jira Agile Board, record the field name that does the board assignment (a custom drop-down menu or a label in Jira). This might be different for each Jira project being mapped.

Jira Project	Dropdown menu or Label	Field Name	JA Team Name	Value to set in Jira

4. Run JET (available in the Atlassian Marketplace) for the boards you wish to integrate. Your Jira Align Solutions Architect will assist. JET will help determine how your boards and sprints should be configured and optimized for the integration, as well as provide some useful metrics about the cleanliness of your data in Jira.



5. Determine the start date (how far back in time) from which you want to import data. This will determine how many historical Program Increments you need to set up in Jira Align.

Date to import from:		

#### Jira custom field IDs and issue type names

1. Record the Issue Type Names for company-managed projects in the table below. This is a word, not a number, see the example screenshot.

≡	ÄJIRA Dashboards -	Projects -	Issues -	Boards -	Create	
<i>@</i>	ZEUS / ZEUS Dons Fea	-22 ature AAA	Ą			
	Sedit Comme	ent Assign	To Do	In Progress	Done	Admin 👻
₽ □	Details Type:	Epic		•	Status:	
<u>Þ</u> -	Priority:	ጰ Major			Resolutio	on:
000	Labels: Epic Name:	None Dons Feature	AAA			

2. Record the Issue Type IDs for your company-managed projects in the table below. To find the Issue Type IDs, follow the instructions outlined here: <u>https://confluence.atlassian.com/jirakb/finding-the-id-for-issue-types-646186508.html</u>

Jira Issue Type	Your Issue Type Name (e.g. Task)	Your Issue Type ID (e.g. 10000)	Description
			Five-digit issue type ID number and name from Jira for Epic.
Epic			* If you're using Jira Data Center and can't find an issue type called Epic, the issue type name may have been <u>changed</u> .
Story			Five-digit issue type ID number and name from Jira for Story.
Sub-task			Five-digit issue type ID number and name from Jira for Sub-Task (or Task).
Defect			Five-digit issue type ID number and field name from Jira for Bug/Defect.

3. Record the Custom Field names and ID numbers in the tables below. The quickest way to collect the Custom Field IDs is to open the Advanced Issue Search in Jira and start typing the field name. This will show you the Custom Field number as shown in the screenshot below.

s - Projects - Issues - Boards - Create
Search Save as
× rank
Rank - cf[10300]
Syntax Help
T Key Summary
ZEUS-22 Dons Feature AAA

Custom Field Purpose	Your Custom Field Name (e.g. Points)	Your Custom Field ID (e.g. customfield_10000)	Description
Epic name			Five-digit custom field ID number and field name from Jira for EpicName.
Epic ID link			Five-digit custom field ID number and field name from Jira for EpicLink or EpicIDLink.
Story points			Five-digit custom field ID number and field name from Jira for Story Points.
Sprint ID			Five-digit custom field ID number and field name from Jira for SprintID.
			The field name of the value/flag set when a user completes the workflow on an item by clicking the <b>DONE</b> button on the issue screen.
Accepted date			* This one can be tricky to find as it is called Accepted, AcceptedDate, ResolutionDate, Resolution, or Resolved depending on the version of Jira being used and any customizations that may have been made.
Rank			Five-digit custom field ID number and field name from Jira for Rank.

#### Additional fields for company-managed projects

These fields may be used with Jira Align and Jira integration if created.

Custom Field Purpose	Your Custom Field Name (e.g. Points)	Your Custom Field ID (e.g. customfield_10000)	Description
Blocked			Optional: Five-digit custom field ID number and field name from Jira for Blocked for Jira Align features. This field is commonly called Flagged in Jira.
Business driver			Optional: Five-digit custom field ID number and field name from Jira for Business driver for Jira Align features.
Capitalized			Optional: Five-digit custom field ID number and field name from Jira for Capitalized for Jira Align features.
Category			Optional: Five-digit custom field ID number and field name from Jira for Category for Jira Align features.
Feature points			Optional: Five-digit custom field ID number and field name from Jira for Feature Points.

		Optional: Five-digit custom field ID number and name from Jira for Team.
Team		Note: Jira Align supports syncing this information with either a custom field of your choice or <u>using</u> <u>the API 2.0 to sync with your Jira</u> <u>instances's built-in team field</u> (the Atlassian Teams field for Jira cloud or Shared Teams for Jira Data Center). Regardless of method, the field's ID is required to set up syncing this information. If you choose to sync this information with your Jira instance's built-in team field, make sure to complete data collection to set up the mapping, described in <u>Step 3a</u> <u>of this article</u> .
		Optional: The Status value from Jira which will result in items being permanently deleted from Jira. Use the format <b>12345</b> when filling in the Custom Field ID.
Deleted item status		* Do not use this if you want to use the recycle bin (two-stage delete) process in Jira Align.
		** Regulated industry customers may have processes to support requirements around who may delete items from production/ production support/development systems.
MMF		Optional: Five-digit custom field ID number and name from Jira for MMF.
Product		Optional: Five-digit custom field ID number and name from Jira for Product for Jira Align features.

Feature portfolio ask date		Optional: Five-digit custom date picker field ID number and name from Jira for Portfolio Ask date for Jira Align features.
Feature start / initiation date		Optional: Five-digit custom date picker field ID number and name from Jira for Start / Initiation date for Jira Align features.
Feature target completion date		Optional: Five-digit custom date picker field ID number and name from Jira for Target Completion date for Jira Align features.
Why? details		Optional: Five-digit custom field ID number and name from Jira for Portfolio Ask date for information from Jira Align's Why panel. Use the following format: customfield_123. This is a PUSH ONLY from Jira Align to Jira. The field in Jira must be read-only. Some Jira configurations may make the Why field appear editable, but any changes made will be overwritten on the next sync with Jira Align.
Parent feature name		Optional: Five-digit custom field number and name from Jira for a parent item for Jira Align features (either an Jira Align capability or epic). This is a PUSH ONLY from Jira Align to Jira. The field in Jira must be non-editable by anyone except admin/Jira Align integration role.
Jira Align Pl		Optional: Five-digit custom field number and name from Jira for Jira Align Program Increment. This is a PUSH ONLY from Jira Align to Jira. The Jira field must be non-editable by anyone except admin/Jira Align integration role.
------------------------------	--	--
T-shirt		Optional: Five-digit custom field number and name from Jira for T- shirt sizing. This is a PUSH ONLY from Jira Align to Jira. The Jira field should be a select list (single option) field.
Capability parent		Optional: Five-digit custom field number and name from Jira for a capability's parent epic, to display on Jira Align features where capabilities are enabled. This is a PUSH ONLY from Jira Align to Jira. The Jira field must be non-editable by anyone except admin/Jira Align integration role.
Work code (features only)		Optional: Five-digit custom field number and name from Jira for a work code on Jira Align features.
Acceptance criteria		Optional: Five-digit custom field ID number and name from Jira for Acceptance Criteria.
Type (features only)		Optional: Five-digit custom field ID number and name from Jira for Type on Jira Align features.
Priority (features only)		Optional: Five-digit custom field ID number and name from Jira for Priority on Jira Align features.

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Text input custom		Optional: Five-digit custom field ID number and name from Jira for a text input custom field you'd like to sync on Jira Align features.
		Duplicate this row to add information about additional text input custom fields.
Single-select dropdown custom		Optional: Five-digit custom field ID number and name from Jira for a single-select dropdown custom field you'd like to sync on Jira Align features.
neids		Duplicate this row to add information about additional single- select dropdown custom fields.

a. If you plan to sync team information with your Jira instance's built-in teams field, create a list of Jira and Jira Align team information you'll use later to set up the team mapping with the API 2.0. You may need the assistance of your organization's Jira API user to collect this information and set up team mappings later.

• For Jira Cloud, the individual team ID can be found at the end of the URL when viewing the team's Atlas page. You may need to <u>add Atlas to your Jira Cloud instance</u> if it's not added already.

Awesome Sauce - Te	eams - Atlas X +	/team/fb2ff271_7036_4f5	1-24fd-80296e2de6e7	
- 1:1 C Splunk C I	Integrations X Confluence	Sprint 👹 Tenants	Testery D Observa	bility 🗅 RTE 🗅 H
Directory	Teams Y Add p	eople		
		Awe	esome Sauce	
		• •	pen team	
			Join this team	1
			Give kudos	

Alternatively, use the Jira API to send a **POST gateway/api/v4/teams/search** call to return a list of all teams, including their IDs. Replace the organization ID and site ID with your own instance's <u>organization</u> ID and <u>site ID</u>:

```
{
    "organizationId": "9390b32a-83f9-4f04-95fd-1dd0899b5183",
    "query": "",
    "siteId": "71f9dfd8-8fe7-4b2d-aeaa-d5e88b461f54",
    "sortBy": null
}
```



- For Jira Data Center, the Jira team IDs can be found under **Plans > Manage Shared Teams**:
  - 1. Right-click the table of shared teams and select Inspect to open the developer console.
  - 2. Select the Network tab.
  - 3. Refresh the page and select **find** on the left of the developer console. The list of shared team information will display on the right, with the **id** parameter listing a team's ID.



Jira team name (e.g. Superheroes)	Jira team ID (e.g. 2c6d6e42-bc7b-4fb0-bf62- 645293f675a4 for Jira Cloud; 99 for Jira Data Center)	Jira Align team name (e.g. Superheroes)	Jira Align team ID (e.g. 1234)

4. Create a list of custom issue types (anything that is not an epic, story, or bug) that you want to synchronize with Jira Align stories in your company-managed projects. These issue types will synchronize to Jira Align as stories with a specific type.

Custom Issue Type	Your Issue Type Name (e.g. Spike Story)	Your Issue Type ID (e.g. 10000)	Intended Use

5. Create a list of custom issue types (anything that is not an epic, story, or bug) that you want to synchronize with Jira Align features in your company-managed projects. These issue types will synchronize to Jira Align as features with a specific type.

Custom Issue Type	Your Issue Type Name (e.g. Spike Story)	Your Issue Type ID (e.g. 10000)	Intended Use

6. Create lists for team-managed projects of the issue type names and IDs in the tables below. The IDs for each issue type are specific to each individual project, so create a separate list for each team-managed project.

You can locate individual issue type IDs for team-managed projects on the project's **Project Settings** > **Issue Types** page by hovering over the issue type name on the left-hand sidebar. The ID is the five-digit number at the end of the URL on the lower-left of the page.

	Artichoke	Projects / Artichoke / Project settings / Issue types					Fields		
	Next-gen software project	5 Epic	ൃ° Edit workflow	<b>6</b>		Fields capture an need to carry out	d display the info t your project's wo	rmation people rk.	
<b>G</b> Issu	Project settings	Epics track collections of related bugs, stories, and tasks.				CREATE A FIELD Drag a field type to the left area to create a custom field for your "Epic" issues.			
5	Epic	Description fields	Wh	at's this?		40	_		
	Bug	Aa Summary				Short text	– Paragraph	Date	
	Story	= Description		>		123	0	٩	
	Task					Number	Time stamp	Labels	
•	Subtask	Context fields	Wh	at's this?		•		٩	
+	Add issue type	→ Status				Dropdown	Checkbox	People	
1		Assignee							
		Labels		>		Reuse fields from	your other issue	types. Or, add a	
		🛗 Start date					and of a trind-part	y app.	
		Due date				<b>↑</b> Priority			
			N				nent		
						Ö Time tra	cking		
		Reporter				📤 Sprint			
						<sup>123</sup> Story po	int estimate		
	<b>1</b>								
١	/ou're in a next-gen project								
G	ive feedback Learn more	Save changes Discard							
ttps://	.atlassian.net/jira/software/projects/ART/se	ettings/issuetypes/10009							

Jira Issue Type	Your Issue Type Name (e.g. Task)	Your Issue Type ID (e.g. 10000)	Description
Epic			Five-digit issue type ID number and name from Jira for Epic.
Story			Five-digit issue type ID number and name from Jira for Story.
Sub-task			Five-digit issue type ID number and name from Jira for Sub-Task (or Task).
Defect			Five-digit issue type ID number and field name from Jira for Bug/Defect.

Additional fields for team-managed projects							
These fields may be used w	These fields may be used with Jira Align and Jira integration if created.						
Custom Field Purpose	Your Custom Field Name (e.g. Points)	Your Custom Field ID (e.g. customfield_10000)	Description				
Story points			Optional: Five-digit custom field ID number and field name from Jira for Story Points.				

Parent feature name		Optional: Five-digit custom field number and name from Jira for a parent item for Jira Align features (either a Jira Align capability or epic). This is a PUSH ONLY from Jira Align to Jira. The field in Jira must be non-editable by anyone except admin/Jira Align integration role.
Capability parent		Optional: Five-digit custom field number and name from Jira for a capability's parent epic, to display on Jira Align features where capabilities are enabled. This is a PUSH ONLY from Jira Align to Jira. The field in Jira must be non-editable by anyone except admin/Jira Align integration role.
Program increment text field		Optional: Five-digit custom text field number and name from Jira for Jira Align Program Increment. This is a PUSH ONLY from Jira Align to Jira. The Jira field must be non-editable by anyone except admin/Jira Align integration role.
Acceptance criteria		Optional: Five-digit custom field ID number and name from Jira for Acceptance Criteria.
Feature portfolio ask date		Optional: Five-digit custom date picker field ID number and name from Jira for Portfolio Ask date for Jira Align features.



Feature start / initiation date		Optional: Five-digit custom date picker field ID number and name from Jira for Start / Initiation date for Jira Align features.
Feature target completion date		Optional: Five-digit custom date picker field ID number and name from Jira for Target Completion date for Jira Align features.

7. Create a list of Link Actions. Link Actions may be imported from Jira and converted into dependencies in Jira Align.

Link Name (e.g. Blocked by)	Issue Link Type ID (e.g. 10000)	Intended Use

8. Determine if the following fields are required on work items.



Item	Required on Epic (Yes/No)	Required on Story (Yes/No)	Required on Defect (Yes/No)
Points on epic?		N/A	N/A
Is Team required when an item is created?			
Is Reporter required when an item is created?			
Sync State bidirectionally?			
Sync Work Item bidirectionally?			
Sync Rank bidirectionally?			N/A

# Jira integration setup

Ensure you have completed all steps in <u>Jira integration prerequisites</u> and <u>Jira integration data collection</u> before proceeding.



- Set up program increments and sprints
- Preparing for connector setup in Jira Align
- Establish connection
- <u>Map projects to programs</u>
- Map boards to teams
- Configure timers, issues, and fields
- <u>Configure field management settings</u>
- Pull Jira user data
- Set up team-managed projects
- <u>Map statuses to states</u>
- Sync existing issues
- <u>Check connector activity</u>
- <u>Authentication types</u>
- Jira setup fields
- <u>Viewing logs</u>
- <u>Manage custom fields</u>

### Set up program increments and sprints

1. Determine program increment cadence and mapping to programs (quarterly is typical). Try to get as many programs as possible to use the same program increment to facilitate organizational alignment.

Program Increment Name	Start Date	End Date	Program

- 2. Determine the sync date cadence for the program increments.
  - If all teams participating in a program increment have similar sprint start and end dates, use those dates as the sync dates. You can adjust the setting for matching to sprints if needed. The default value is three days prior or post the sync date end.

Program Increment Name	Sprint Length	Start of First Sprint

#### Sprint syncing

When the first active Jira sprint is brought into Jira Align, the end date is recorded in Jira Align. It is matched to a sync sprint within a set buffer date range. All future sprints on the Jira board are then matched in board order to the next in line Jira Align sync sprint.

To set a buffer date range:

1. Select the Settings gear

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in the top navigation bar.

- 2. On the left side of the page, select **Jira Settings** in the **Connectors** section.
- 3. Select the Jira Setup tab.
- 4. In the **Sprint Buffer Days** field, type the number of buffer days you'd like to use.

We recommend setting the Sprint Buffer Days value between 1 and 3 days to allow room for error in case a team forgets to complete a Jira sprint on time. However, this setting shouldn't be used to allow teams additional time to complete their work.

Generation of sync sprints when the PI is created is required unless the **Sync Sprints from Jira** option is set to **Yes**. If using this setting, the program-level teams (RTE/Architect/Product Manager) and the team-level teams (Product Owner and Scrum Master) are unable to plan and load stories into future sprints as this setting will only create the Jira Align sprint when the Jira sprint is added to the board.

#### "Bucket" sprints

If teams are not following Atlassian recommended practices for backlog management but are instead creating a "bucket" sprint, administrators will need to use the sprint override function to adjust those sprints regularly.

For example, a team has one active sprint on a team board, the "bucket" sprint is viewed as an intended future sprint and will be mapped to the next sync sprint. When the team then creates their next sprint and drags it above the "bucket" sprint, the integration picks it up as sprint 3 from the Jira board. The team then drags that sprint above the "bucket" sprint.

Jira Align administrators will need to remap the true sprint to the next sync sprint:

#### 1. Select the Settings gear

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in the top navigation bar.

- 2. On the left side of the page, select Jira Management in the Connectors section.
- 3. Select the Jira Sprints tab.
- 4. Use the table to remap sprints as needed.

#### **Recommended practices for Jira teams**

- Do not create or use "bucket" sprints for backlog refinement. Instead, use Jira's project backlog for refinement as recommended by Atlassian.
- Create sprints on board for each sprint in the PI at the start of each PI. As stories are ready and prioritized, the team can load the future sprints in Jira, either in conjunction with, in advance of, or instead of big room planning.

#### Recommended practices for Jira Align/BU Admins

- Check for mismatched and out of alignment sprints routinely based on your team sprint schedules within the PI.
- Generate all sync sprints when the PI is created.

### Preparing for connector setup in Jira Align

You should configure Jira settings in Jira Align for the correct data synchronization. You can customize a number of settings according to your needs.

To configure and turn on integration:

- 1. In Jira Align, set up portfolios and programs.
- 2. Create program increments and sync dates you identified in <u>Jira integration data collection</u>.

Once these steps have been completed, you can configure settings on the Jira Settings and Jira Management pages.

### **Establish connection**



#### 1. Select the **Settings gear**

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in the top navigation bar.On the left side of the page, select **Jira Settings** in the **Connectors** section.

 If you have multiple Jira instances and want to link them to Jira Align, do the following: Important: Jira Align installation team has to set up a separate service for each Jira connector to enable this functionality.

a. Select **Jira Connectors** (top-right of the page), and then select the necessary Jira connector from the corresponding dropdown menu.

b. In the Jira Link field, type the URL to connect to Jira, for example,

https://jiraalign.atlassian.com/browse/{external}.

c. In the **Admins** field, you can allow certain users to be able to see and manage the connector settings. If this field is left blank, any users with access to the Jira Settings page will be able to manage the connector settings. However, if one or more users are selected in this field, only they will be able to manage them.

d. In the **Jira API URL** field, type the URL that the connector uses to make API calls to Jira, for example, https://jiraalign.atlassian.com/.

e. Select the authentication type for the connector. The authentication type descriptions are available <u>here</u>. The **Service** option indicates if the Windows Service is running (green) or has stopped (red). The **Active** option indicates if the connector is activated (green) or deactivated (red).

f. Select Add to add more Jira instances, as needed.

g. Close the dialog box.

h. Select the necessary Jira connector from the **Connector** dropdown menu (top-right of the page).

### Map projects to programs

- 1. To add Jira projects, select **Add Project** on the **Manage Projects** tab, and then complete the fields in the table. Use the information you collected in <u>Jira integration data collection</u>.
  - Project Key: Type the Jira project key.
  - **Project Name:** Type the Jira project name. Note that if the Jira project name changes, the name displayed in Jira Align will automatically change.
  - **Program:** Select the Jira Align program your Jira project will map to.
- 2. Select Save.

**Note:** The table can be filtered by one or more values in the Project Key, Project Name, and/or Program fields. To filter the table:

1. Select the column name.

Project Key 🔫		Proje
Find Project Key	Q	Celine Te
Clear selected items		
CEL		
All Project Keys		
FTP		

- 2. In the list of items, select the checkbox next to one or more options to narrow the filter. You can also search for a specific item by typing its name in the text field.
- 3. The filter criteria appear above the list of items, and the table filters to display items that meet the filter criteria.

To remove a filter:

- 1. Select the column that contains the filter you want to remove.
- 2. At the top of the list of items, select the option or options to remove from the filter criteria.
- 3. Select Clear Selected Items to remove the filter criteria.

### Map boards to teams

Perform team mapping and use the information you collected in <u>Jira integration data collection</u>:



- 1. Select Jira Management on the left, and then open the Jira Boards tab.
- 2. From the **Connector** dropdown menu, select the Jira connector for this Jira board.
- 3. Select Add Board and type the board ID and team name in the corresponding boxes.
- 4. From the dropdown menu, select the program.
- 5. The **Jira Board** column fills automatically from the board ID, team, and program you selected. Use this field to ensure that your mapping is correct. If no project is found, a yellow **warning**

icon will appear next to the Project Key and the Jira Board column will not fill. Point to the icon to see the issue and actions needed to resolve it. This error often occurs for one or more of the following reasons:

- The connector service account does not have permission to view the board in Jira or the board was deleted.
- The board has a filter share without the parent project.
- The board has a filter share with multiple projects.
- The board does not have a project location in Jira's cloud version or does not have at least one shared project in the filter.

This error will result in stories assigned to the Jira Backlog not properly receiving a team assignment when they are synced with Jira Align.

6. It is recommended to sync Only sprints created on board for all integrated boards and ensuring that teams in Jira create sprints only on the actual board that will be integrated with Jira Align to ensure sprints are in alignment. If Only sprints created on board is selected, the connector will only map Jira sprints to Jira Align when the originBoardId from Jira matches the ID of the board integrated with Jira Align. Sprints that are not pulled in will be logged in the logs of each integrated board. Additional information on origin sprints can be found here:

https://community.atlassian.com/t5/Jira-Align-articles/Jira-Align-and-Jira-Integration-Jira-Management-Shared-Sprints/ba-p/1265111

7. Select Save.

### Configure timers, issues, and fields

- 1. Select **Jira Settings** on the left, open the **Jira Setup** tab, and then complete the fields in this section. The field descriptions are available in the **Jira setup fields** section below.
- 2. Select Save.
- 3. Open the **Jira Integration** tab, and then select **Run** to start the initial setup synchronization. This will create teams, sprints, and populate states.
- 4. Open the Custom Issue Types tab, and then complete the fields in this section:

a. Jira custom issue types are converted to stories in Jira Align and can be assigned a different type. In this section, select **Add** and map Issue Type IDs in Jira to the corresponding Story Types in Jira Align. Select the necessary Jira connector for each issue type.

Note: You can set up story types in the Settings > Platform > Dropdowns section.

- 5. Select Save.
- 6. Team-managed projects contain issue types that are project-specific. To set up fields for teammanaged projects, see the <u>Set up team-managed projects</u> section.

## **Configure field management settings**

Select the **Field management** tab to configure your field mappings. Here, you'll set up Jira Align's built-in fields, as well as <u>custom fields</u> you've added to your Jira Align instance. This tab consists of mapping tables of



Jira Align fields and their corresponding Jira field IDs, organized by Jira Align work item.

legration settings						
Projects States	Boards	Sprints	Release Ve	hicles	Items	
unnection Management		Conne	ector: 1: Jira GD	3	▼ Jira C	onnectors
Manage Projects Jira Setup Field manage	ement New Custom Issue Types	Jira Integration	Pull Jira User Data	State Mapping	Resync configuration	n
opings and settings that affect field values	in Jira Align and Jira, including bu	uilt-in and custom	n field mappings.	Required fields	are marked with	an asterisk*
TURE The sync direction for feature fields is se option on the Jira Setup tab before mapp	it by <b>Allow feature sync from Ji</b> ing the fields here.	ira Align to Jira	setting on the Ji	ra Setup tab. N	L Nake sure to selec	Add field
TURE The sync direction for feature fields is se option on the Jira Setup tab before mapp IRA ALIGN FIELD	t by <b>Allow feature sync from Ji</b> ing the fields here. SYNC	<b>ira Align to Jira</b> JIR	setting on the Ji A FIELD ID	ra Setup tab. N	L Nake sure to selec	Add field
TURE The sync direction for feature fields is se option on the Jira Setup tab before mapp IRA ALIGN FIELD	et by <b>Allow feature sync from Ji</b> sing the fields here. SYNC	ira Align to Jira JIR c	setting on the Ji A FIELD ID ustomfield_1010	ra Setup tab. N 2	C Make sure to selec	Add field t the desired
TURE The sync direction for feature fields is se option on the Jira Setup tab before mapp IRA ALIGN FIELD Feature points MMF	t by Allow feature sync from Ji ing the fields here. SYNC CHANGE SYNC DIRECTION CHANGE SYNC DIRECTION	ira Align to Jira JIR c c n n only	setting on the Ji A FIELD ID ustomfield_1010	ra Setup tab. N 2	Aake sure to select	Add field t the desired
URE The sync direction for feature fields is se option on the Jira Setup tab before mapp RA ALIGN FIELD ature points IMF riority	et by <b>Allow feature sync from Ji</b> ing the fields here. SYNC CHANGE SYNC DIRECTION CHANGE SYNC DIRECTION Sync to Jira Aligr Sync to Jira only	ira Align to Jira JIR c v n only	setting on the Ji A FIELD ID ustomfield_1010	ra Setup tab. N 2	Aake sure to select	Add field t the desired

► ▼ Fields mapped on this tab (select to expand)

To add a field mapping:

- 1. Select Add field in the upper-right. A slide-out displays.
- 2. In the Jira Align field dropdown, select the Jira Align built-in or custom field you'd like to map.
- 3. Optionally, in the Sync direction field, select the direction you'd like the field to sync.
- 4. In the **Jira Field ID** field, select the corresponding Jira custom field ID. The list of selectable fields is limited to fields with similar (syncable) Jira field types.

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- 5. Several fields require you to map field values in the **Map field values** section before they can sync between Jira and Jira Align.
  - ► ▼ Fields that require value mappings (select to expand)

To map field values, select a Jira Align value in the **Jira Align** column, and enter its corresponding value in the **Jira Software** column. You may map multiple values from one app to a single value in the other; however, many-to-many mappings aren't allowed.

**Note:** The starred value is the value your work items will receive when no value is set in an app. For example, if you create a feature in Jira Align and assign it a priority, but no priority is set in Jira, the connector will assign the starred Jira value on the Jira epic during the initial sync.

- 6. Add additional mappings as needed by selecting Add field value mapping in the lower-left.
- 7. When you're done mapping field values, select **Save** to save your changes.

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#### Map field values

Configure new custom fields

This starred 🖈 custom dropdown is the custom dropdown your work items will receive when syncing from Jira Align to Jira. To make another custom dropdown the starred custom dropdown, edit your mapping so that the desired Jira custom dropdown is listed first.

Jira Align	Jira Software					
★Custom Dropdow ×	$\leftarrow \rightarrow$	★Custom value ×	8			
+ Add field value mapping						
			Save			

- 8. The field mapping is added to the table on the field management tab.
- 9. If needed, you can return to the slide-out by pointing to a mapping row, then selecting the **More actions** (three dots) menu to the right of the row and selecting **Edit mapping**.
- If needed, mappings can be deleted by pointing to a mapping row, then selecting the More actions (three dots) menu to the right of the row and selecting Delete.
   Note: You can undo a mapping deletion immediately after deleting it by selecting Undo in the lower-left.

11. For the **Feature points** field, you may optionally use the arrow(s) indicator in the **Sync** column to change the sync direction.

Note: Other field sync directions are set by the Allow feature sync from Jira Align to Jira setting on the Jira Setup tab.

### Pull Jira user data

Open the **Pull Jira User Data** tab, and then use the **External ID Jira User field sync** dropdown to select how you want to update Jira Align users' name, email, and external ID fields based on Jira user data.

**Note**: If you log into Jira Align with the <u>Atlassian Guard authentication option</u> and the connector syncs with a Jira Data Center instance, set the **External ID Jira User field sync** dropdown to **None**. This will prevent user external IDs from being overwritten, which could cause account lockouts.

- None: Select to update Jira Align users' First Name, Last Name, and Email fields from Jira.
- Username: Select to update Jira Align users' First Name, Last Name, Email, and External ID fields. The External ID field will update differently depending on the type of connected Jira instance:
  - If the connector syncs with a Jira Cloud instance, the **External ID** field of Jira Align users will be overwritten with Jira users' Atlassian Account IDs (AAIDs).
  - If the connector syncs with a Jira Data Center instance, the **External ID** field of Jira Align users will be overwritten with Jira users' usernames.

Select the **User data pull** button to run the synchronization. If you create a user in Jira Align before using the Jira integration or before a user has work in Jira, the connector uses email addresses to match users for sync.

## Set up team-managed projects

Your Jira instance may consist of a combination of company-managed and team-managed projects. Teammanaged projects contain unique states, custom field IDs, and issue type IDs, so they must be set up individually. To set up a team-managed project with the connector:

- 1. Open the Manage Projects tab.
- 2. In the Project Key column, select the project key of the team-managed project to view its details.
- 3. In the slide-out that displays, open the **Team-managed project settings** tab.
  - Note: This tab only displays on the slide-out when a project is a team-managed project.
- 4. Fill in the text fields on the tab:
  - **Story and feature points custom field**. The key for the Jira field used for storing the story points. Use the format: customfield\_10001.
  - **Parent work item custom field on features**. The key for the Jira read-only text field used for a parent epic or capability assignment on Jira Align features. Use the format: customfield\_10001. It is synced only one way from Jira Align to Jira.
  - Capability parent custom field. The key for the Jira read-only text field used to display a feature's associated epic (the parent of the feature's parent capability) in portfolios where capabilities are enabled. Use the format: customfield\_10001. It is synced only one way from Jira Align to Jira for features.
  - **Program increment custom field**. The key for the Jira text field used for a program increment. Use the format: customfield\_10001. It is synced only one way from Jira Align to Jira for features.
  - Acceptance criteria custom field. The Jira custom field ID for the multi-line text field that is used for acceptance criteria. Use the format: customfield\_10001.
     Important: If you sync acceptance criteria between Jira and Jira Align, you'll lose Jira Align's functionality to manage multiple, individual acceptance criteria on all synced Jira Align features and stories. Acceptance criteria will be limited to one field per work item in Jira Align. If you decide not to sync acceptance criteria, you'll be able to use the individual acceptance criteria functionality on Jira Align work items, but information will not sync between the two platforms.
  - Feature 'portfolio ask' date custom field. The key for the Jira date picker field that is used for the portfolio ask date on Jira Align features. Use the format: customfield\_10001.
  - Feature 'start / initiation' date custom field. The key for the Jira date picker field that is used for the start/initiation date on Jira Align features. Use the format: customfield\_10001.
  - Feature 'target completion' date custom field. The key for the Jira date picker field that is used for the target completion date on Jira Align features. Use the format: customfield\_10001.

Please note, for the three Feature dates above, when you set up these mappings, the information in the application where the first update is made will sync to the other. For example, if Jira is your current source of truth and the Jira Align item is updated before the Jira item, the dates in Jira Align will sync to Jira. In this case, if Jira is the source of truth, we recommend setting up the mappings during off-hours and then running a JQL to pull the information to Jira Align.

- 1. In the **Feature**, **Story**, **Task**, and **Defect** sections, enter the Jira Issue Type Name and Jira Issue Type ID for each respective work item in the corresponding fields.
- 2. Select Save & Close to save your changes.

### Map statuses to states

Map Jira statuses to Jira Align states or process steps on the State Mapping tab. Keep in mind that teammanaged projects contain unique statuses that must be mapped to states individually.

- 1. Open the State Mapping tab, and then set up mappings from Jira to Jira Align in this section:
  - a. From the Type dropdown menu, select the work item type (epic, feature, story, task, or defect).

b. Select the Jira states you'd like to map to Jira Align states in the corresponding field to add the Jira states to the mapping table.

c. Map each Jira State Description to the corresponding Jira Align State.

Features, stories, and defects that are assigned to a canceled state or workflow state in Jira are automatically moved to the canceled recycle bin in Jira Align. They can also be cancelled in Jira Align, and the state will be set to the cancelled state in Jira.

There is also a delete item state in the Jira connector. When this state is configured, it hard deletes the item in Jira Align.

Note: Deleting a work item in Jira Align does not delete the corresponding issue in Jira.

- 2. Set up state or process step mappings from Jira Align to Jira on the State Mapping tab:
  - a. Select the **State Mapping** option next to a Jira project.

**Note:** If a project hasn't synced with Jira yet, the **State Mapping** option will be unavailable and a **Not synced** message will display instead. The initial sync will run according to your **Timer for Jira boards**, **sprints, and fix versions** setting. If you'd like to run the initial sync sooner, we recommend running a <u>custom JQL query</u> to instantly sync between Jira and Jira Align.

b. Select if you'd like to map Jira Align states or process steps using the toggle at the top of the modal.

c. Use the **Work item type** dropdown menu to select a work item type (epic, feature, story, task or defect).

- d. Map each Jira Align state or process step on the left to a Jira status on the right.
- e. Select Update.

f. Repeat this process for each project to ensure that all statuses are mapped to a state or process step. You can also push the mappings to all company-managed projects using the **Update other Jira projects** option.

3. Select Save.

### Sync existing issues

1. Open the **Jira Integration** tab, and then run the Jira JQL query to immediately synchronize issue types, steps, and sprints for a certain period. Run the data synchronization back through the start date you identified in <u>Jira integration data collection</u>:

a. In the **Projects** field, select the Jira projects to include in the query. Leaving this field blank will include all projects in the query.

b. In the **Jira Search Query** field, type your JQL query, for example, (*created* >= '2014/1/1' or updated >= '2014/1/1') and Project = ZAM.

- c. In the **Order by** box, type order by Rank ASC.
- d. Select Run.

Notes:

- The current integration will continue to run.
- The **Run Board**, **Sprint**, and **Fix Version sync along with the search query** dropdown menu gives you an option not to run the board sync process. Use this when you want to run a Jira integration JQL query so that the JQL can run in less time when the board sync process is not needed to run for the query.

### **Check connector activity**

- 1. Check the Jira audit logs for any issues:
  - a. On the Manage Projects tab, select View Logs.
  - b. View the issues, correct, and resynchronize if needed.
- 2. Check the following areas to confirm that the integration worked as expected:
  - View the work in progress by state and program increment progress reports.
  - View several sprints in the team room.

When a Jira Align work item is connected with a Jira issue, the work item's details panel will include a **View in Jira** button, which will open the linked Jira issue in your Jira instance.

If a work item has synced with Jira previously, but the connector encounters mapping issues that prevent the sync of information, the Jira Align details panel will display these issues at the top.

Test Epic v	with Jira 🖉	×					
A We couldn Contact yo Last Updated: Last Updated By	't sync this wo our Jira Align ac 4/2 y: Site	rk item with Jira. Iministrator for 3/2024 10:43:23 Admin	. The associated Jir more assistance. PM	a project isn'	't mapped to the	e assigned Jira	Align primary program.
🖉 Details	⇔Design	Spend	Development				
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Type: Not Set	MMF:	Block	ked: Pr	iority: Not Set	•		View in Jira Unlink from Jira
Contained In:	N	o Parent Object	Assigned				प्ति Discussions 🧿
Primary Prog	ram:	IS Classic Projec	ct (Kanban templat	te		6	#Responsibility Matrix

#### ► **Connector issues listed on the details panel** (select to expand)

You may wish to contact your Jira Align administrator, and/or select the **Unlink from Jira** button to remove the work item/issue association(s) causing the error. If unlinking a story, this will also remove the links for any child sub-tasks. After unlinking from Jira, resyncing the Jira issue will create a new work item in Jira Align.

## Authentication types

The connector uses the following methods for authentication against the Jira REST API.

#### API token authentication (Cloud)

**Note:** API token authentication is the replacement for the deprecated cookie-based authentication and the deprecated user name and password basic authentication.

To configure API token authentication:

- 1. From the Authentication Type dropdown menu (see Step 3 (b) of the Configure and activate Jira integration procedure above), select Basic with API Token Authentication.
- Type the user name and token of the user whose credentials you plan to use for the connection, and then select Save. To create a token, refer to the following documentation: <u>https://confluence.atlassian.com/cloud/api-tokens-938839638.html</u>

**Note:** The existing values are not shown on the UI for the security purposes. If you enter and save new values, they will overwrite the existing values. All communication is sent over encrypted HTTPS connections.

#### OAuth authentication (Cloud and Server/Data Center)

Jira uses <u>Application Links</u> to allow and manage OAuth.

To configure OAuth authentication:

- 1. From the Authentication Type dropdown menu, select OAuth 1.0 Authentication.
- 2. In the **Jira OAuth Consumer Key** box, type a consumer key of your preference, for example, JiraAlignOAuth.
- Note: Do not use spaces.
- 3. Select Save.
- 4. Select Generate OAuth Public Key.
- Sign in to Jira as a service administrator, and then go to Administration > Applications > Integrations > Application links.
- 6. Type the URL to the Jira Align application, and then select **Create new link**.

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Applications	Projects	Issues	Add-ons	System	User manag	jement	Billing	Discover new application	ons			
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7. Select the Use this URL check box, and then select Continue.

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JIRA Software configuration				Creat		A.
JIRA Software Labs	Entered URL	https:// agilecraft.c	com			А
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Configuration		Checking this will skip any	further validation and use this	ASSIAN		
Email requests				SSIAN		
INTEGRATIONS	New URL					
Application links						
DVCS accounts			Continue Cance	el		

 In the Link applications dialog box, type an application name of your preference, make sure Generic Application is selected for the Application Type, and then select Continue. No other fields need to be completed. The link is created, and now you need to configure it.

≡ ÖJIRA Dashboards - Pr	ojects - Issues - Bo	ards - Create	Search	٩	r\$ (?)	<b>.</b>
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Application links DVCS accounts	Consumer key			ASSIAN		1
HipChat	Shared secret					
Application Navigator	Access token URL					
	Authorize URL					
	Create incoming link					
			Continue Cance			

- 9. Select the pencil icon next to the link you created, and then select Incoming Authentication.
- 10. In the **Consumer Key** box, type the consumer key you created in Jira Align in Step 2.

11. Type a consumer name of your preference.

≡ ŸJIRA	Dashboards - Projects -	Issues - Boards -	Create	Search	q	\$	? -	\$
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12. Scroll down and, in the **Public Key** box, insert the public key you generated in Jira Align in Step 4.

	Dashboards - Projects	<ul> <li>Issues - Boards -</li> </ul>	Create	Search	Q	5	? -	\$
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JIRA SOFTWA			A short name for	the consumer site, to help users i	dentify the			
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JIRA SERVICI			at http://jira.myco	mpany.com'.				
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- 13. Select Save.
- 14. Go back to Jira Align, and then select **Authorize Jira OAuth access**. Wait for the Jira connector to run. It runs even if deactivated.
- 15. Make sure you're logged into Jira as the service administrator, then select **Request Jira for access** in Jira Align.

**Note:** If you need to restart the process of authorizing a new token (to reset something), select **Restart Jira OAuth access**.



- Select Allow, and then close the page that appears.
   Note: When you need to authorize a new token (if a token expires), select Re-Authorize Jira OAuth access.
- 17. Select Save.

**Note:** If you change the consumer key or generate a new public key, you will need to reconfigure the Jira application link for OAuth again.

#### Personal access token (PAT) authentication (Server/Data Center)

You can use a personal access token (PAT) to authenticate into the Jira API. To configure PAT authentication:

- 1. From the **Authentication Type** dropdown menu (see Step 3 (b) of the Configure and activate Jira integration procedure above), select **PAT Authentication**.
- 2. Type the PAT of the user whose credentials you plan to use for the connection, and then select **Save**.

Note: When creating the PAT in Jira, make sure to uncheck the Automatic expiry checkbox.

### Create a personal access token

Use personal access tokens as a safe alternative to authenticating with username and password.

Personal access tokens are as important as passwords and should be equally protected.

#### Token Name\*

Number of characters remaining: 40

#### Permissions

Permission level of personal access tokens is set to the level of access you currently have.

#### Expiry date

For security reasons, you can set this token to automatically expire. You can't change the expiry date once the token is created.

Automatic expiry							
Days until expiry							
90							
The token will never expire.							
Create	Cancel						

#### **Cookie-based authentication (deprecated)**

**Note:** Cookie-based authentication is deprecated and will be removed in the future in accordance with the Atlassian REST API policy.

To configure cookie-based authentication:

- 1. From the Authentication Type dropdown menu (see Step 3 (b) of the Configure and activate Jira integration procedure above), select Cookie-based Authentication.
- 2. Type the user name and password of the user whose credentials you plan to use for the connection, and then select **Save**.

**Note:** The existing values are not shown on the UI for the security purposes. If you enter and save new values, they will overwrite the existing values. **Cookie-based authentication** uses session cookies to authenticate. All communication is sent over encrypted HTTPS connections.



### Jira setup fields

You can configure the following options on the Jira Setup tab in Jira Align for the correct data synchronization:

#### Timer for Jira boards. sprints, and fix versions

- **Timer for Jira boards, sprints, and fix versions**. Type the number in minutes for how often the Jira boards synchronize with Jira Align, between 60 and 1440 minutes. The default value is 60 minutes.
- Jira sprint mapping buffer days. Jira sprints are mapped automatically to Jira Align sprints if they have similar sprint start and end date. Adjust the number of days that can deviate for a sprint. The default value is three days prior or post the Sync Date end. We recommend setting this value between 1 and 3 days to allow room for error in case a team forgets to complete a Jira sprint on time.

#### Pull from Jira

• **Pull from Jira**. Type the number in minutes for how often the Jira issues synchronize with Jira Align, between 3 and 120 minutes. Jira Align queries data based on the Jira project and issue type combinations it is configured for. Running an issue timer keeps track of when data was last synced.

#### Push to Jira

• **Push to Jira**. Type the number in minutes to set the interval for the continuous push of data from Jira Align to Jira and not make any Jira API calls, between 1 and 120 minutes. The default value is 1.5 minutes.

#### **Notification**

- Allow Jira connection alert API calls. Select Yes to allow connecting to the Jira API.
- Alert when Jira API connection fails. Select Yes to receive emails when the connectivity to the Jira connector fails. The Allow Jira connection alert API calls option needs to be activated to send the failed API connection alerts.
- Send alerts if Jira Align cannot connect to API. Type email addresses (separated with commas) to send the alert emails to.

#### **Issue Types**

These fields you have already identified in the **Jira custom field IDs and type names** section under <u>Jira</u> <u>integration data collection</u>.

- Feature issue type. The numeric ID (required) and name (optional, informational only) for the issue type that is used as an epic in Jira company-managed projects.
   Note: Team-managed projects contain unique issue type IDs that must be mapped individually (see the Set up team-managed projects section).
- Story issue type. The numeric ID (required) and name (optional, informational only) for the issue type that is used as a story in Jira company-managed projects.
   Note: Team-managed projects contain unique issue type IDs that must be mapped individually (see the <u>Set up team-managed projects</u> section).
- **Task issue type**. The numeric ID (required) and name (optional, informational only) for the issue type that is used as a sub-task (or task) in Jira company-managed projects. This identifies the sub-task issue type for tasks to be created in Jira as (when tasks are created in Jira Align and then sync to Jira).
- Defect issue type. The numeric ID (required) and name (optional, informational only) for the issue type that is used as a bug in Jira company-managed projects.
   Notes:
  - Bidirectional sync of defects only supports one Jira issue type. The entry in the ID field determines what issue type is synced to Jira from Jira Align. If the ID is not supplied, the sync will only pull defects from Jira and will not push changes from Jira Align.
  - Team-managed projects contain unique issue type IDs that must be mapped individually (see the <u>Set up team-managed projects</u> section).

#### Custom Fields

Some fields you have already identified in the **Jira custom field IDs and type names** section under <u>Jira</u> <u>integration data collection:</u>

- Jira Epic name custom field (this field may alternatively be called Feature name custom field if you're only syncing with Jira Data Center or Jira Server). Optional if you're syncing to one or more Jira Cloud projects. The key for the Jira field used for storing the epic name. Use the format: customfield\_10001.
- Feature custom field on stories. The key for the Jira field used for storing the epic link or epic ID link when you assign a story to an epic. This will sync with the Feature name field on stories in Jira Align. Use the format: customfield\_10001.
- **Story points custom field**. The key for the Jira field used for storing the story points. Use the format: customfield\_10001.
  - Sync direction. The direction(s) the story points custom field will be synced.
- **Sprint custom field**. The key for the Jira field used for storing the sprint ID. Use the format: customfield\_10001.
- **Resolution date custom field**. The field name of the value/flag set when you accept/resolve the issue. This one is usually called ResolutionDate in Jira.
- **Default user**. If, for some reason, the connector cannot find the matching user, it will use this user as a default one.
- **Team custom field**. Optional: In the dropdown, select whether you'd like to sync team field information with a <u>built-in Jira team field</u>, or with another custom field of your choice. In the text field, enter the key for the Jira field used for a team. Use the format: customfield\_123.
- Story and feature backlog rank custom field. Numeric ID value from Jira for a rank in the backlog. Use the format: 12345.
- **Delete item status**. Optional: The **Status** numeric ID value from Jira which will result in items being permanently deleted from Jira Align. Do not use this if you want to use the recycle bin (two-stage delete) process in Jira Align. Regulated industry customers may have processes to support requirements around who may delete items from production/ production support/development systems. Use the format: 12345.
- **Default Jira Align story and feature priority**. When you create a feature or story in Jira Align, it will create a feature or story issue type in Jira. This is a default priority that the connector will set on the newly-created issue in Jira. This is a one-time sync upon creation; editing the feature or story in Jira Align will not update the priority in Jira. The priority also does not sync to Jira Align when a feature or story issue type is first created in Jira. This setting will be ignored for features if you map feature priorities on the field management tab.
- **Product custom field**. Optional: The key for the Jira field used for a product. It shows what product the feature maps to. Use the format: customfield\_123. You also need to map Jira products to Jira Align products under the **Customize** link. **NOTE**: The Jira custom field must be of type **Select List (single choice)** and contain a list of products in Jira against which Jira Align will match the mapped products.

Please note, for the three Feature dates above, when you set up these mappings, the information in the application where the first update is made will sync to the other. For example, if Jira is your current source of truth and the Jira Align item is updated before the Jira item, the dates in Jira Align will sync to Jira. In this case, if Jira is the source of truth, we recommend setting up the mappings during off-hours and then running a JQL to pull the information to Jira Align.

- Sync Jira resolver name on stories. Select whether to sync information from Jira to Jira Align on which user accepted/resolved stories in Jira. We recommend setting this to **No** for faster connector performance.
- Jira change log resolution label. The label name in the change log in Jira used when you set an issue to Resolved.

- Parent work item custom field on features. The key for the Jira field used for a parent item assignment on Jira Align features. Use the format: customfield\_123. Read-only in Jira. It is synced only one way from Jira Align to Jira.
- **Program increment custom field**. The key for the Jira field used for a program increment. Use the format: customfield\_123. It is synced only one way from Jira Align to Jira for features.

• **T-Shirt custom field**. The key for the Jira select list (single choice) field used for the feature's T-shirt size estimate. Use the format: customfield\_123. Use the **Sync direction** menu to choose the direction of sync: either **Bidirectional sync** (default) or **Jira to Jira Align sync**. Select the **Configure** link to open a settings window where you can map t-shirt size values between Jira Align and Jira.

Jira T-Shirt Setup	Connector:	1: Jira 🔹				
These values are global for both team managed and company managed projects. To add more options, go to     platform settings and updated the Estimation Conversions						
T-Shirt		Jira Value				
No estimate						
X-Small		X-Small				
Small		Small				
Medium		Medium				
Large		Large				
XL		XL				
XXL						
		Update				

#### Notes:

- In the Sync direction dropdown, a third choice, Jira Align to Jira sync was available in the past. If you currently have this option selected, it will remain available. We no longer support new connector setups using this option. If you change your sync direction to either the Bidirectional or Jira to Jira Align option, the Jira Align to Jira option will no longer be available. This is because users see better results either designating Jira as the source of truth or using a bidirectional sync.
- This field only syncs when the Jira Align portfolio is set to use t-shirt size estimates through the Settings > Platform > Portfolio > Portfolio Specific Configuration > Estimation System setting.
- Inside the Configure link for mapping, the values for T-Shirt are collected from t-shirt sizes set up for features. Configure your t-shirt size names at Settings > Platform > Portfolio > Estimation Conversions.
  - If a t-shirt size is deleted from the <u>Estimation Conversions menu</u> for features, existing features that contained the size will have their t-shirt estimates set to **No estimate**. This change will not sync to Jira until another edit is made to the feature inside of Jira Align. Syncs from Jira to Jira Align will not complete successfully unless a valid, mapped value is set on the Jira epic.
- Inside the **Configure** link for mapping, leave the **Jira Value** field for the **No estimate** row blank if you would like to map No estimate in Jira Align with an empty value in Jira.
  - If you map a custom Jira value such as "not estimated" with the No estimate Jira Align value, blank entries in Jira will be ignored during sync, and will not affect the Jira Align tshirt estimate.

- **Capability parent custom field.** Optional: The key for the Jira field used to display a feature's associated epic (the parent of the feature's parent capability) in portfolios where capabilities are enabled. Use the format: customfield\_123. Read-only in Jira. It is synced only one way from Jira Align to Jira.
- **Business owner custom field**. Optional: The key for the Jira field used for the Business Owner team role. Use the format: customfield\_123.

#### Settings

- Allow feature title updates from Jira Align to Jira. Select Bidirectional sync to allow changing the epic name in Jira when syncing from Jira Align
- Sync story and feature ranks. Select Bidirectional sync to allow syncing the rank in the backlog. Rank is manually pushed or pulled between Jira Align and Jira by selecting **Pull Rank** on the backlog when the PI is set to **None** in the Configuration bar.
- Allow feature sync from Jira Align to Jira. Select Bidirectional sync to allow syncing from Jira Align to Jira for all features.
- Allow story sync from Jira Align to Jira. Select Bidirectional sync to allow syncing from Jira Align to Jira for all stories.
- Allow defect sync from Jira Align to Jira. Select Bidirectional sync to allow syncing from Jira Align to Jira for all defects.
- Allow task sync from Jira Align to Jira. Select Bidirectional sync to allow syncing from Jira Align to Jira for all Jira Align tasks to Jira sub-tasks.
- Allow story state sync from Jira Align to Jira. Select Bidirectional sync to allow syncing the state of Jira Align story to the issue in Jira.
- Allow feature state sync from Jira Align to Jira. Select Bidirectional sync to allow syncing the state of Jira Align features to the corresponding epics in Jira.
- Allow defect state sync from Jira Align to Jira. Select Bidirectional sync to allow syncing the state of Jira Align defects to the corresponding bugs in Jira. When a state in Jira is set to **Done**, the state in Jira Align will be set to **Closed**.
- Does story creation in Jira require a team assignment? Select Yes if the Jira Story issue type screen has a required team field. This setting will require the custom field ID of the Jira custom field utilized for team mappings to be listed on the Organization field under Jira Align Admin > Jira Settings > Jira Setup.
- **Does epic creation in Jira require a team assignment?** Select **Yes** if the Jira **Epic** issue type screen has a required team field. This mapping as been deprecated for current builds of Jira Align and is scheduled to be removed from the product. Its setting will currently have no impact on the Integration.
- Does creating stories in Jira allow both an assignee and reporter assignment? Select Yes to allow an issue in Jira to have a Reporter and Assignee when it is created. When enabling this setting please ensure that the Jira Issue Create and Edit Screens have both the Reporter and Assignee fields present. You should also validate that users creating Jira Align Work Items and users assigned as Owners to Jira Align work items have the create issue, and assignable user permissions on the corresponding Jira project.
- Is your Jira Team field a cascading select list? Select Yes if the Custom Team field in Jira is a cascading field and No if the Custom Team field in Jira is a single or multi-select field. The parent and child relationships are set up in Jira Align under Manage Custom Fields > Sync Jira Team Values with Jira Align Teams. The Parent field will be populated with the left value of a Jira cascading field and the Child field will be populated with the right value of a Jira cascading field.
- Is your Jira Team field a multiple choice select list? Select Yes if the Team setting is a dropdown menu and No if it is single select to help reading and writing the data.

- Allow Jira to overwrite Jira Align if two simultaneous syncs conflict. It is usually set to No. Select Yes to allow the Jira data to overwrite the Jira Align data when the data is changed at the same time and there is a conflict.
- Make selection of Jira projects mandatory when creating items. Select Yes to make the Jira **Project** option required when you create working items in Jira Align, for example, features.
- Assign features to multiple Jira projects in Jira Align. Select Yes to allow selecting multiple Jira projects for the same program when you create or edit the feature in Jira Align.
- Assign Jira users to Jira Align teams when associated with stories and defects. Select Yes to allow Jira to check which issues the users are associated with and automatically add users to the team to which these issues belong. This setting will also automatically set team member allocations. When a Jira team member is assigned to multiple team sprints associated with the same sync date (anchor sprint), their sprint allocation will automatically be updated to be equal across those sprints, so that they add up to a total of 100% allocation. For example, if a member is assigned to three sprints that use the same sync date, their allocation for each sprint will be 33% per sprint by default. When a user is assigned to a kanban team via the connector, their team allocations are also included in the calculations at the end of each Jira Align anchor sprint. Allocations can be manually updated in Jira Align to override the automatic allocations. For situations where a user is not part of a team in Jira Align, but records time in Jira against a task, Jira Align will add the user to the sprint and team associated with the task's parent story, with 0% allocation.
- Sync sprints from Jira. Select Yes to allow creating sprints in Jira Align based on the sprints in Jira. The sprints will only be created if they can map to a sync date.
- Allow Jira Align to assign stories to sprints. Select Yes to allow Jira Align to assign a story to a sprint in Jira. Otherwise, sprint assignment is one way from Jira to Jira Align. If a board has more than one active sprint or is sharing a sprint with another board, the synchronization will not occur.
- Sync sprint names from Jira. Select Yes to allow renaming sprints in Jira and reflecting these changes in Jira Align automatically. You will not be able to name sprints in Jira Align, and any manual changes to sprint name in Jira Align will be overridden by Jira. The sprint name will still include the Jira Align team name and will look like [Jira Align Team Name Jira Sprint Name].
- Update program increment dates based on sprint or fix version dates. Select Yes to allow the program increment for a feature, story, or defect to be updated by using the latest dates of the Jira fix version or a Jira sprint. If both are assigned, the program increment assignment will be updated using the Jira sprint dates. When set to **No**, the program increment assignment will be automatically updated by Jira fix version dates or sprint dates when the item is created in Jira Align. After the item is created, the Jira fix version or sprint dates will not update the program increment.
- Sync Jira Align release vehicles with Jira fix versions. Select Bidirectional sync to allow Jira fix versions to synchronize with Jira Align. If this option is turned off, fix versions do not synchronize.
- Allow Jira to update the team field for stories. If set to Yes and a customer has a one-to-one ratio of projects/boards/Jira Align teams, the field will sync the Jira Project field with the Jira Align Team field. Syncing will occur only in one direction from Jira to Jira Align. Changes to the Jira Align Team field will not sync back to Jira. Note that this setting does not apply if you have custom field team mappings on.
- Create web links on Jira issues to Jira Align work item. Select Bidirectional sync to create Jira issue web links that link back to the Jira Align features, stories, tasks, and defects.
- Start date of sprint import. Select the start date from which you want to import sprints from Jira into Jira Align. The connector will map sprints created after this date on all integrated boards. Historic issues from Jira can be integrated with Jira Align by running a JQL in Jira Align or conducting a bulk update in Jira. This is the start date you identified in <u>Jira integration data collection</u>.
- **Jira text formatting type**. elect how information in description and acceptance criteria fields should be formatted. The connector automatically detects which tool is being connected to and the editor being



used in Jira to intelligently select this setting value. This will determine the editor functions available in these fields:

• None (plain text) synchronizes the text as-is.



**Note:** Jira Align environments will sync wiki markup feature descriptions for features in programs synced with Jira, even if this setting is set to **None**.

• **HTML** maintains rich text content in Jira and Jira Align. We recommend selecting this value if you're connecting to a Jira instance using a third-party editor that saves in HTML like JEditor.



• **Jira rendered field** saves feature and story description and acceptance criteria field information as wiki markup. For feature descriptions, this is a bi-directional sync.



For story descriptions, as well as feature and story acceptance criteria, the rich text sync is a one-way pull from Jira into Jira Align and data is read-only. To view story description pulled details, select the eye icon next to the story description. Task and defect description information will be synchronized as plain text. We recommend selecting this value if you're connecting to Jira Cloud or Jira Data Center.


- Jira users' Full Name Format. Select a Jira display name format for the Jira users to set the correct first and last name parts in Jira Align. The following options are available: First Last and Last, First. The First Last option is the default one. You need to re-sync the user data on the Pull Jira User Data tab for the changes to happen.
- **Default system role for new users**. Select a system role to assign all new integrated users by default. System roles mainly control what you see: menu items, buttons, and other.
- **Default Team Role for new users**. Select a team role to assign all new integrated users by default. Team roles have certain responsibilities, such as running standup meetings, accepting stories, or managing sprints.

#### <u>Notes</u>

This is in reference to the two Yes/No toggles around the following options:

- Allow Feature and Story Program Increments to be automatically updated by Jira Fix Version Dates
- Allow Release Vehicles to sync with Jira Fix Versions

Permutations:

- No/No or Yes/No Fix versions in Jira will not create or set anything in Jira Align.
- No/Yes Jira fix versions that have a release date that falls between the start and end date of a Jira Align PI will create a corresponding release vehicle in Jira Align. When a Jira project is selected on Jira Align release vehicles, the release vehicle will sync to Jira as a fix version on the corresponding Jira project.
- Yes/Yes The fix version will drive both the PI and the release vehicle.

## **Viewing logs**

On the **Manage Projects** tab, select the **View Logs** button to view audit logs on the Jira synchronization process. The log captures changes to the data on managing projects, Jira setup, custom issue types, Jira integration, pulling Jira user data, and state mappings. You can view the Jira log report for the following items:

- Configuration
- Jira API
- Issues
- Boards
- Sprints
- Release Vehicles

You can also view the log data within a selected time period, or search the logs for entries containing specific text in the entry's details.

The logs also contain filters to further refine the items displayed. To apply a filter:

## Jira Align

- 1. Select the Apply Filters button.
- 2. In the dialog box that displays, select your filtering criteria from the dropdown menu.
- 3. To further refine the filter, select the **plus** (+) sign next to the dropdown menu to activate another field where you can add specific search strings to include in the filter.
- 4. Select the Filter button to view the results in the log.

## Manage custom fields

On the **Manage Projects** tab, select the **Manage Custom Fields** button, and then ensure that you select the right Jira connector at the top of the **Jira Custom Setup** dialog box.

#### Sync process steps with Jira states

You can map process steps in Jira Align to the Jira states. Depending on the state of the working item in Jira, the corresponding process step will be set in Jira Align for this item. The synchronization works only one way from Jira to Jira Align.

To sync process steps with Jira states:

- 1. Under Sync Process Steps with Jira States, select a level and a process flow.
- 2. Map the Jira states on the left to the corresponding Jira Align process steps on the right.
- 3. Select Update Steps.

#### Sync Jira products and MMF

You can add custom fields in Jira and map them to the corresponding fields in Jira Align for synchronization. For example, you can create new fields for MMF and Product in Jira (under **Administration** > **Issues** > **Custom Fields**), and then map them in Jira Align. Jira Align field names should match the values in Jira.

#### Sync Jira team values with Jira Align teams

You can synchronize Jira teams with Jira Align teams. As there is no team field in Jira, the custom field is usually created in Jira for this purpose.

If your projects use different team custom fields for selecting teams in each project, you must map each custom field by project and associated teams.

To sync Jira team values with Jira Align teams:

## Jira Align

- 1. Under Sync Jira Team Values with Jira Align Teams, select Add New.
- 2. Select the Jira project to which the Jira team that you want to synchronize belongs.
- 3. Select whether the team custom field in Jira is a dropdown menu or a label.
- 5. In the **Jira Team Value** box, type the name of the team in Jira that you want to synchronize. This must match exactly the board name in Jira.
- 6. From the **Jira Align Team** dropdown menu, select the team in Jira Align with which you want to synchronize the Jira team.
- 7. Select Update Teams.
- 8. To add more teams, select Add New and repeat Steps 5–7.

If no projects are selected, the default values are used.

To sync Jira default team values with Jira Align teams:

- 1. Under Sync Jira Team Values with Jira Align Teams, select Add New.
- 2. In the **Jira Team Value** box, type the name of the team in Jira that you want to synchronize. This must match exactly the board name in Jira.
- 3. From the **Jira Align Team** dropdown menu, select the team in Jira Align with which you want to synchronize the Jira team.
- 4. Select Update Teams.
- 5. To add more teams, select Add New and repeat Steps 2-4.

#### Sync acceptance criteria

For features and stories, you can synchronize a Jira custom field with acceptance criteria with Jira Align's acceptance criteria. In the box, type the Jira custom field ID that is used for acceptance criteria on company-managed projects, for example, customfield\_12345.

**Important:** If you sync acceptance criteria between Jira and Jira Align, you'll lose Jira Align's functionality to manage multiple, individual acceptance criteria on all synced Jira Align features and stories. Acceptance criteria will be limited to one field per work item in Jira Align. If you decide not to sync acceptance criteria, you'll be able to use the individual acceptance criteria functionality on Jira Align work items, but information will not sync between the two platforms.

#### Set up Jira link actions

You can synchronize issue links from Jira and convert them into dependencies in Jira Align.

To set up Jira link actions:



- 1. Under Set up Jira Link Actions, select Add New.
- 2. Type the link ID (you can get it by taking an example from Jira and exporting it to XML; look for issuelinktype id).
- 3. Type the link name (for example, Depends On; look in Jira).
- 4. From the Action dropdown menu, select the action type. Story Predecessor allows dependency generation on the story link report for the <u>default Jira issue links</u>. Story/Task Link allows the linkage of a Jira custom issue type to a Jira Align task. We recommend this link type for <u>custom issue links</u>.
- 5. If the link action is a story/task link, type the issue type ID used for tasks in Jira in the Issue ID text field
- 6. Select Update Link.

After the setup, the issue links from Jira appear on the story's page in Jira Align under **Story Links** on the right. You can view the links from the story and to this story.

Here, you can convert the Jira issue links to Jira Align dependencies. Select the check boxes next to the stories you want to convert, and then select **Mass create dependencies**. The stories should belong to a feature to create a dependency.

You can also generate a report of all story links, which are not yet converted to dependencies on the <u>story link</u> <u>report</u> page.

#### Sync Jira Bug to Jira Align Defect Priorities

You can configure the bi-directional mapping between the Priority field on Jira bugs and Jira Align defects in this section of Manage Custom Fields. Out-of-the-box and custom priorities from Jira will show on the left and you can setup bi-directional mapping to Jira Align by selecting a Jira Align priority on the right. If there is a greater number of priorities in Jira than Jira Align, and there is a single Jira Align priority mapped to multiple Jira priorities, the connector will default to the priority highest on the list in the Jira Align User Interface.

## Jira management settings

To access the Jira Management Settings page:

#### 1. Select the Settings gear

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in the top navigation bar.

2. On the left side of the page, select Jira Management in the Connectors section.

Three tabs display on this page:



- Jira Boards
- Jira Sprints
- Manage Jira Deleted Issues

## Jira Boards

To map a Jira board to a Jira Align team, follow these steps:

- 1. Before mapping a Jira board, make sure that its parent project is associated with a Jira Align program on the the <u>Jira Settings</u> page.
- 2. Next, access the Jira Management page. Select the Settings gear

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in the top navigation bar.

- 3. Select Jira Management in the Connectors section.
- 4. Click the Jira Boards tab.
- 5. At the top-right of the page, Click Add Board to create a new row of cells in the grid.
- 6. Input a board ID number in the ID cell, which represents the rapid view ID from Jira.
- 7. The board name from Jira will automatically populate in the **Board name** field once Jira Align verifies connectivity to the board.
- 8. The **Jira Sprints** column cannot be edited and will populate when the board syncs. The column displays the total number of sprints associated with the board.

**Note:** If the connector cannot access sprints in Jira, the count of these deleted or inaccessible sprints will display in red, next to the total sprint count.

### 3 [1]

You can click these sprint counts to view details about them and resolve any issues on the <u>Jira Sprints</u> tab.

- 9. In the **Jira Align Program** cell, select the board's associated program. This should match the program that the board's project is mapped to on the Jira Integration Settings page.
- 10. In the **Jira Align Team** field, type an existing Agile team name to map the board to an existing team in Jira Align; or, type a new team name to have the connector create the team for you as an Agile team.
- 11. In the **Jira Sprints to Sync** drop-down menu, select if you wish to sync only sprints created on the board or sprints created and shared to the board with the integration.\*\*
- 12. Click **Save** at the top-right of the page to save your changes.

\*We recommend only syncing sprints created on the board to ensure sprints are aligned correctly from Jira to Jira Align. Jira Align uses placeholder sync sprints to assign start and end dates to Jira future sprints. Errant sprints shared across multiple boards will prevent the connector from making this prediction properly.

#### If issues occur, a yellow warning



icon will appear next to the ID. Point to the icon to see the issues and actions needed to resolve them.

**Note:** The table can be filtered by one or more values in the Jira Board, Jira Align Program, and/or Jira Align Team field. You can also filter the table by whether or not issues occurred during the sync. To filter the table:

## 🗖 Jira Align

1. Click the column name.

Jira Board 🔻	Jira A
Find Board	Q
All Boards	
RHCP1 Board	
SC1 board	
A6TP board	
ADP board	
Alpha	
ANG board	
AP-Test2	
AT board	
Board 2.0	1221-12664

- 2. In the list of items, select the checkbox next to one or more options to narrow the filter. You can also search for a specific item by typing its name in the text field.
- The filter criteria appear above the list of items, and the table filters to display items that meet the filter criteria.

To remove a filter:

- 1. Select the column that contains the filter you want to remove.
- 2. At the top of the list of items, select the option or options to remove from the filter criteria.

Select **Clear Selected Items** to remove the filter criteria.

To stop integrating a Jira board with Jira Align:

- 1. Select the three dots (...) icon on the far right of its row to see more options.
- 2. Select Delete Board to remove the board integration.

## **Jira Sprints**

Use the Jira Sprints tab to manage sprints that have been mapped between Jira and Jira Align . Click the JiraSprintstab, and then ensure that you select the right Jira connector and boards at the top of the Jira Managementpage.



#### Jira Fit View report

In Jira, sprints might not go one right after another. The **Jira Sprint Fit View** report is used to see the sequence of sprints in Jira. It is a calendar view that provides a better outline of how Jira sprints look within a program.

The teams within the selected program are listed on the left side. For each sprint, a bar appears that represents the start date and end date of the sprint overlaid on the calendar. Move the pointer over the bar to see how many points are accepted within the sprint.

To view the report:

- 1. Open the Jira Sprints tab.
- 2. Click the Fit View button.
- 3. Select a PI and a program from the drop-down menus. You can select multiple PIs and programs here.
- 4. Click Run Report.
- 5. To navigate the report:
  - To zoom in or zoom out, click the plus or minus sign.
  - To scroll horizontally, click the right or left arrow.

#### Auto-Sync Jira Align sprints

You can automatically map Jira sprints to Jira Align sprints if they have similar sprint start and end date. Under **Jira Setup > Sprint Buffer Days**, you can adjust the number of days that can deviate for a sprint. We recommend setting this value between 1 and 3 days in case a team forgets to complete a Jira sprint on time. The default value is three days prior or post the Sync Date end.

To auto-sync Jira Align sprints:

- 1. Open the Jira Sprints tab.
- 2. From the **Boards** drop-down menu above the grid, select the board with the sprints you want to autosynchronize.
- 3. Click the Auto-Sync Jira Align Sprint button.
- 4. Click Yes in the confirmation dialog box.

#### Resync future sprints

You can resynchronize the future sprints so that all your changes in Jira and/or Jira Align will reconstruct the dates and Jira Align sprint mapping. In order for the future sprints to have new dates calculated and remapped to an Jira Align sprint, all anchor dates and Jira Align sprints need to be set up.

After the future sprint data is cleared, this schedules the Jira board to synchronize during the next custom timer. If the board is already scheduled to synchronize or is currently synchronizing, the **Resync Future Sprints** button does not appear.

To resync future sprints:

## Jira Align

- 1. Open the Jira Sprints tab.
- 2. From the **Boards** drop-down menu above the grid, select the board with the future sprints you want to resynchronize.
- 3. Click the Resync Future Sprints button.
- 4. To synchronize future sprints for the other boards if needed, repeat Steps 2–3.

#### Sync Jira sprints on demand

You can synchronize sprints of a Jira board on demand and not wait until it is time for all boards to be synchronized automatically. The sprints are synchronized one way from Jira to Jira Align. Make sure the **Create Sprints in Jira Align from Jira** option is set to **Yes** on the **Jira Setup** tab.

To sync Jira sprints on demand:

- 1. Open the Jira Sprints tab.
- 2. From the **Boards** drop-down menu above the grid, select the board with the sprints you want to synchronize on demand.
- 3. Click the Sync Board Now button.
- 4. To synchronize sprints for the other boards if needed, repeat Steps 2–3.

#### **Columns**

Jira Sprint: Sprint ID that comes directly from Jira.

Status: The sprint status that comes directly from Jira which can be closed, active, or future.

**Dates:** These dates will come directly from Jira for closed and active sprints. Jira does not provide the start and end dates for future sprints. Jira Align predicts future sprint dates as they come over from Jira by using the active Jira sprint as a baseline and setting the start and end dates of future sprints to the subsequent program increment sync sprint date period.

**Recommended Jira Align Sprint:** This is the Jira Align sprint the connector recommends aligning to the corresponding Jira sprint based on the start and end date from Jira and the Jira Align program increment sync sprints.

**Jira Align Sprint:** This is the actual Jira Align sprint issues associated to the Jira sprint will be assigned to. Selecting a new sprint and clicking **Save** at the top of the page will override the integrated sprint with the selected sprint.

If any mapping issues occur, a yellow **warning** icon will appear next to the Jira Sprint column. Hover over to the icon to see the issues and actions needed to resolve them.

To stop integrating a Jira sprint with Jira Align:



- 1. Select the **three-dot** icon on the far right of its row to see more options.
- 2. Select **Ignore sprint from mappings** to remove the sprint integration. The sprint will remain in the list, but the Jira Align Sprint will display as **Jira sprint removed from team sprint sync**.
- 3. If you need to reinstate the sprint integration, select the **three-dot** icon again and then select **Reinstate Jira Sprint.**
- 4. To permanently delete a sprint that has been deleted in Jira, select the **three-dot** icon and then select **Permanently delete sprint**. Only sprints that have been deleted in Jira can be permanently deleted from the sprint list.

### Manage Jira Deleted Issues

You can generate the Jira Deleted Issues report to view all Jira Align items that are linked to a Jira issue that was permanently deleted by a user in Jira. Issues that had their parent project's permissions changed so that the Jira Connector Service Account no longer has permissions to view the issue will also show on the report. The report will display the Jira Key, the type of Jira Align work item (as an icon) and its ID, and the work item's name in Jira Align. Accepted stories and features, as well as closed defects are not included in the report.

**Note:** The Jira Deleted Issue Report transmits a large amount of API Calls between Jira Align and your Jira environment. It is highly recommended to run this report once a week, and schedule the run during non-working hours to prevent any interruptions to the regular sync of data.

To manage Jira deleted issues:

- 1. Open the Jira Deleted Issues tab.
- 2. Select a date and time to run the check. To run the report as soon as possible, enter the current date and next upcoming hour. For example, if it is 3:30PM, schedule the report to run at 4PM. The hour you choose to run the report will be in the **Time Zone** selected in your <u>personal preferences</u>.
- 3. Click the Check for deleted Issues button.
- 4. After the report query has been completed, set Hierarchy and PI Filters in the context menu or locally on the page to parse data. Selections made on the page will override the Configuration bar once the Filter button is selected.
- 5. Click the Error Types Field and Filter on Only 'Issue does not exist'
- 6. View the report:
  - Click the link under the **Jira Key** column to view the item in Jira. It may still exist but have a new name.
  - Click the link under the ID column to view the item in Jira Align.
- 7. Toggle-on the sliders to the right of each item you want to delete, remove the Jira key from, or ignore.
- 8. On the toolbar, select one of the following options:
  - Delete. Remove all selected items from Jira Align.
  - **Remove Jira Key**. Delete the Jira keys associated with the selected Jira Align work items. This will keep the Jira Align items and disconnect the Jira issue from them.
  - **Ignore**. Remove all selected Jira Align work items from this report. This will keep the item in Jira Align and leave the Jira keys connected to the item. Ignored items may appear again in a future report if the items are still not found in the future.
- 9. Alternatively, select one of the **Delete All**, **Ignore All**, or **Remove Jira Key All** options to affect all items returned by the report. Note that these options will delete, ignore, or remove the Jira key from all items found by the report, including those not visible on the current page of results.



#### Notes:

- The Jira Deleted Issue Report displays issues for which Jira Align can no longer access via the API, indicating the permissions on the Parent Project changed or an issue was deleted in Jira (displayed with a red warning icon). If issues were previously synced to Jira Align and then then the Jira project was removed from the integration, the issues will not display on the report since. It is recommended that once a Jira Project is removed from the integration, permissions are updated so the appropriate issues show on the report. The report also displays API parsing errors via a yellow icon; the parsing errors should be ignored or filtered out using the **Error Types**, as the issues still exist in Jira.
- Scheduling the report to run, as well as deleting, removing the Jira key from, or ignoring items requires
  that the Read-only Mode system role permission toggle under Jira Deleted Issues is switched off.
  However, users may still view the report if the Jira Deleted Issues system role permission toggle is
  switched on. You may edit system role permissions on the Roles settings page.

# Jira migration and Jira Align integration support

It is possible to migrate your Jira instance, and this is the impact on the Jira Align–Jira integration.

To integrate Jira with Jira Align:

• Ensure mutual TLS is set up and working properly. If you require any technical assistance, please reach out to Jira Align's customer support.

To change the connection within Jira Align to Jira:

- 1. Select the Settings gear
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in the top navigation bar.

- 2. On the left side of the page, select Jira Settings in the Connectors section.
- 3. Select the **Jira Connectors** button in the upper-right of the page.
- 4. Select the necessary connector, click **Deactivate**, and then click **Yes** in the confirmation message.
- 5. In the Jira API URL box, enter the API URL for the new Jira environment.

Note: If you use OAuth or API token authentication, we suggest that you authorize a new token.

3. Click the **Test Now** link to test the connection.

**Note:** This does not test authentication—only connectivity to the new environment. If there are connection issues, click **View Logs** on the **Manage Projects** tab to check the logs for the Jira connector.

- 4. Click **Activate** to re-activate the connector.
- 5. Monitor Jira logs in Jira Align to ensure that the Jira connector is authenticating.

## Set up Jira connector team mappings with the API 2.0

You can now sync team information from Jira Align with a built-in Atlassian teams field, using the API 2.0:

- Jira Cloud: Team team picker field
- Jira Data Center: Shared Teams field

To create a team mapping with the API 2.0, send a **POST** call to

align/api/2/Connectors/{ConnectorId}/TeamMappings, using your own Jira Align and Jira team ID to map the teams with one another in the request body:

```
{
   "teamId": 1, // Jira Align team ID
   "externalTeamId": "team-id-1", // Jira built-in team ID
   "alternateName": "mapping name" // OPTIONAL - mapping name for easier reference
}
```

Perform the API call for each new mapping that needs to be created.

If needed, you can edit or delete team mappings. First, locate the team mapping ID you'd like to edit using a **GET** call to **align/api/2/connectors/1/teamMappings/**.

To edit a team mapping, use a **PUT** call to the URL of the mapping you'd like to edit, for example:

https://support.zendesk.com/hc/en-us/articles/6272614474010

PUT https://companyname.jiraalign.com/rest/align/api/2/connectors/1/teamMappings/35

Replace **companyname.jiraalign.com** with your own instance URL, and **35** with the team mapping ID. Use the request body to change mapping information, similar to creating a new mapping.

To delete a team mapping, use a **DELETE** call to the URL of the mapping you'd like to delete. No request body is needed to delete a team mapping.

For more details, check out the **ExternalTeamMapping** resource in our Swagger documentation at <u>/rest/align/api/docs/index.html</u>

## 🖬 Jira Align