Jira Align

Jira Integration Guide

version 11.30 and above, October 2026



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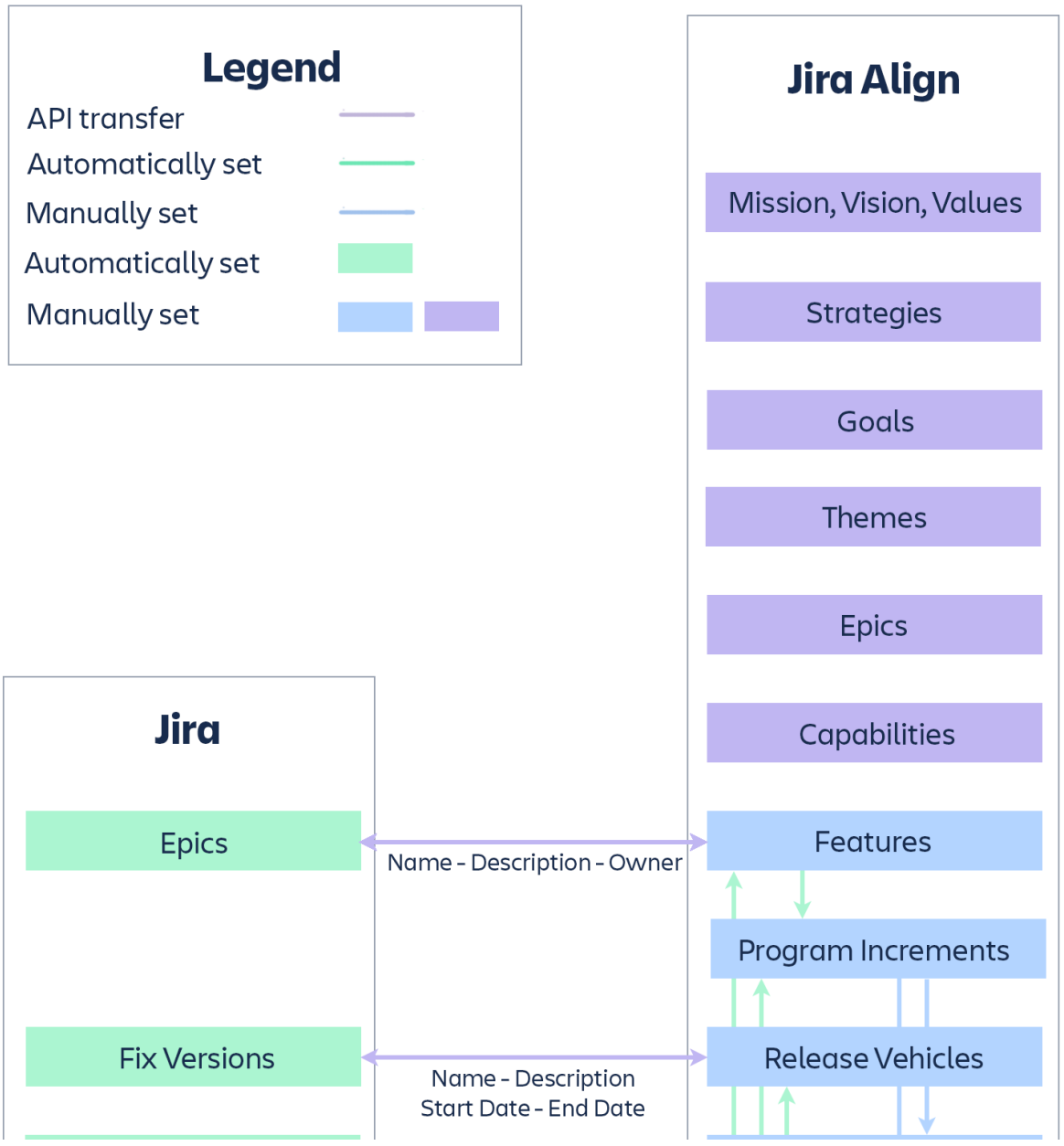
Set up Jira connector team mappings with the API 2.0 85

Integrations

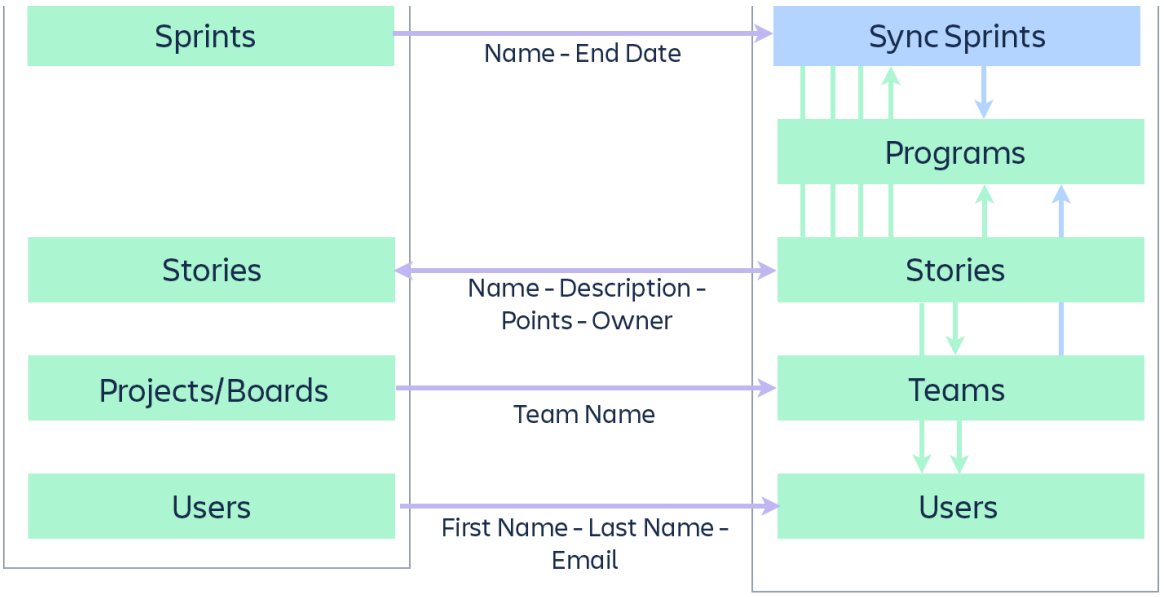
Jira integration guide

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 space key and work item type combination was triggered and defines a lookback timer for each space and work item type. The connector then updates or creates work items in Jira Align based on all corresponding Jira work items so that no cleanup is needed.



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Jira Space becomes Jira Align Program Backlog

All work items from the Jira Space are mapped to a Program in Jira Align. One or more Jira spaces 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

Field	Create		Update	
	JA to Jira	**Jira to JA**	**JA to Jira**	**Jira to JA**
Name		Yes		

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Jira User becomes Jira Align User

Field	Create		Update	
	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 Pull Jira User Data process.
- Jira users are created in Jira Align when they own work items within Jira spaces mapped to an Jira Align program. If the work item is assigned to a sprint in Jira and the Jira Align setting **Assign Jira users to Jira Align teams when associated with stories and defects** 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 Jira Settings page.

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Jira Fix Version becomes Release Vehicle in Jira Align

Field	Create		Update	
	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 work items (epics, stories, and bugs), it only adds them.

* Fix version to release vehicle Status field sync:

- Jira spaces are associated with Jira Align programs. Jira fix versions are associated with Jira spaces.
- 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 work item 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 work item in Jira or a JQL Query ran in Jira Align against the work item(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 work items.

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

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- On the release vehicle create screen, a selection of a program increment associated with a Jira Align program that is associated with a Jira space will render a Jira space 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	
	JA to Jira	**Jira to JA**	**JA to Jira**	**Jira to JA**
Name		Yes		Yes
End Date		Yes		Yes
Goal		Yes		Yes

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Jira Epic becomes Feature in Jira Align

Field	Create		Update		
	JA to Jira	**Jira to JA**	**JA to Jira**	**Jira to JA**	**Notes**
Name	Yes	Yes	Yes	Yes	The Jira Cloud **Epic Name** field syncs with the **Jira Align Jira Epic Name** custom field. In Jira Server or Data Center, the **Epic Name** field syncs with the Jira Align feature's **Title** field.
Summary	Yes	Yes	Yes	Yes	

Additional notes on feature synchronization:

- If a feature is pushed to multiple Jira spaces 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 Work Item Types become Stories in Jira Align					
Field	**Create**		**Update**		**Notes**
	JA to Jira	**Jira to JA**	**JA to Jira**	**Jira to JA**	
Name (Jira Summary)	Yes	Yes	Yes	Yes	
Description	Yes	Yes	Yes	Yes	The field support rich text editor. R text editor suppo between Jira Alig and Jira works w HTML plug-ins o and will not work with plug-ins that use a customized wiki markup. In addition, the mapped Jira fiel must be configured to us the plugin's render. Rich tex editor support is not currently supported with Jira Cloud (user must sync plain text).
Description	Yes	Yes	Yes	Yes	The field suppor a rich text editor Rich text editor support betwee Jira Align and Ji Server or Data Center works wi HTML plug-ins only and will not work with plug-i that use a customized wiki markup. In addition, the mapped Jira fiel must be configured to us the plugin's render. Rich tex editor support is not currently supported with Jira Cloud (user 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	
Estimate (Points)	Yes	Yes	Yes	Yes	
Owner (Jira Assignee)	Yes	Yes	Yes	Yes	The following applies when you consolidated the **Create** and **Edi** Jira screens. If t Jira Align **Owne** field is populate but the **Reporte** field does not ex in Jira, the sync will fail. If the **Reporter** field does not exist ir Jira and the Jira Align **Owner** fiel is not populated the sync will be successful because the connector skips the mapping.
Assigned Team	Yes	Yes	Yes	Yes	
Assigned Sprint	Yes	Yes	Yes	Yes	
Parent Feature	Yes	Yes	Yes	Yes	

Status	Yes	Yes	Yes	Yes	The field supports rich text editing in Jira and extended support between Jira Align and Jira work items. HTML tags in the comments section and will not work with plug-ins that use a customized wiki markup.
Acceptance Criteria	Yes	Yes	Yes	Yes	
Program Increment	Yes	Yes	Yes	Yes	Applied from Jira Fix Version
Assigned (Jira Assignee)	Yes	Yes	Yes	Yes	Spaces in tags are replaced with an underscore as Jira labels do not support spaces.
Status	Yes	Yes	Yes	Yes	The comments section in Jira is updated with details and the work item is transitioned
Tags	Yes	Yes	Yes	Yes	The tags with a prefix in Jira Align are generated by the Jira connector by default. These are tags for the work item key, fix version name, and sprint name. Tags with a "-" prefix will not sync from Jira Align to Jira
Release Vehicle	Yes	Yes	Yes	Yes	
Program Increment	No	Yes	No	Yes	Applied from Jira Fix Version with the latest date, sprint overrides if confi
Blocked	Yes	Yes	Yes	Yes	
Type		Yes		N/A	Set to a configured value for custom work item types
Business driver	Yes	Yes	Yes	Yes	
Capitalized	Yes	Yes	Yes	Yes	
Category	Yes	Yes	Yes	Yes	
Type	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	

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Tags	Yes	Yes	Yes	Yes	Spaces in tags a replaced with an underscore as Ji labels do not support spaces. The tags with a “j prefix in Jira Alig are generated by the Jira connecto by default. These are tags for the work item key, fix version name, ar sprint name. Tag with a “j:” prefix w not sync from Jira Align to Jira.

Jira Sub-Task or Task becomes Task under Jira Align Story

Field	Create		Update	
	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 Jira Settings. This is to support roll-up reporting of the stories.
- Configuring task synchronization in Jira Settings identifies the sub-task work item 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

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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 support a rich text editor. Rich text editor support between Jira Align and Jir works with HTML plug-ins only and will not work with plug-ins that use customized wiki markup.

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Estimate (Points)	Yes	Yes	Yes	Yes	Points from Jira a visible and can b used when synce from Jira even if the particular Points value is n available in Jira Align. For estimating stories Jira Align uses Modified Fibonac 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 differe value in Jira Alig the Jira-specific point value will disappear as an option from the Effort Points drop down menu. All changes are sav in the audit log.
Assigned Team	Yes	Yes	Yes	Yes	
Assigned Sprint	Yes	Yes	Yes	Yes	
Assigned (Jira Assignee)	Yes	Yes	Yes	Yes	

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Priority	Yes	Yes	Yes	Yes	Priority can be mapped through Manage Custom Fields. If a priori value is not mapped, and the synced from Jira Jira Align will set the priority to **Normal**.
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 a replaced with an underscore as Ji labels do not support spaces. The tags with a " prefix in Jira Alig are generated by the Jira connecto by default. These are tags for the work item key, fix version name, ar sprint name. Tag with a "j:" prefix v not sync from Jir Align to Jira.
Program Increment	No	Yes	No	Yes	Applied from Jira Fix Version with t latest date; sprin overrides if confli

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Jira integration prerequisites

Supported Jira versions

The connector supports all Atlassian-supported Jira versions. See the Atlassian Support End of Life Policy 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 space prerequisites

1. Create a dedicated account for the integration. The type of account depends on the authentication method you plan to use:

- **API token, API token with scopes, OAuth 1.0, PAT, or Cookie-based (deprecated):** Create a Jira user specifically for the integration.
- **OAuth 2.0 (Atlassian service account):** An organization admin creates an Atlassian service account instead of a Jira user. A service account isn't associated with a person and doesn't use a password. See Create an Atlassian service account.

You'll use this account to configure the connector, either on your own or with help from your solutions architect.

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The account must have the following space permissions on all Jira spaces that you plan to synchronize to Jira Align:

- Administer Jira
- Browse spaces
- Manage sprints
- Assignable user
- Assign work items
- Close work items
- Create work items
- Edit work items
- Link work items
- Modify reporter (if you consolidated the **Create** and **Edit** Jira screens)
- Resolve work items
- Schedule work items
- Transition work items
- 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 language setting is set to English (US or UK) in Jira, and do not use Jira user translations for work item type field values so that they match the default Jira work item type names (Epic, Story, etc.)

2. Ensure that each Jira space and its work items meet the following criteria:

- Both the **Create Work Item** and **Edit Work Item** 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 work item type in Jira spaces you connect to if the **Enable Feature Point Sync** setting is set to **Yes** in Jira Align. This setting 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 all three available estimation systems, 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 space-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" work item key with a work item key ID from the space(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 Jira application setting for **User email visibility** must be set to **PUBLIC** or **LOGGED IN USERS ONLY**.

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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/*

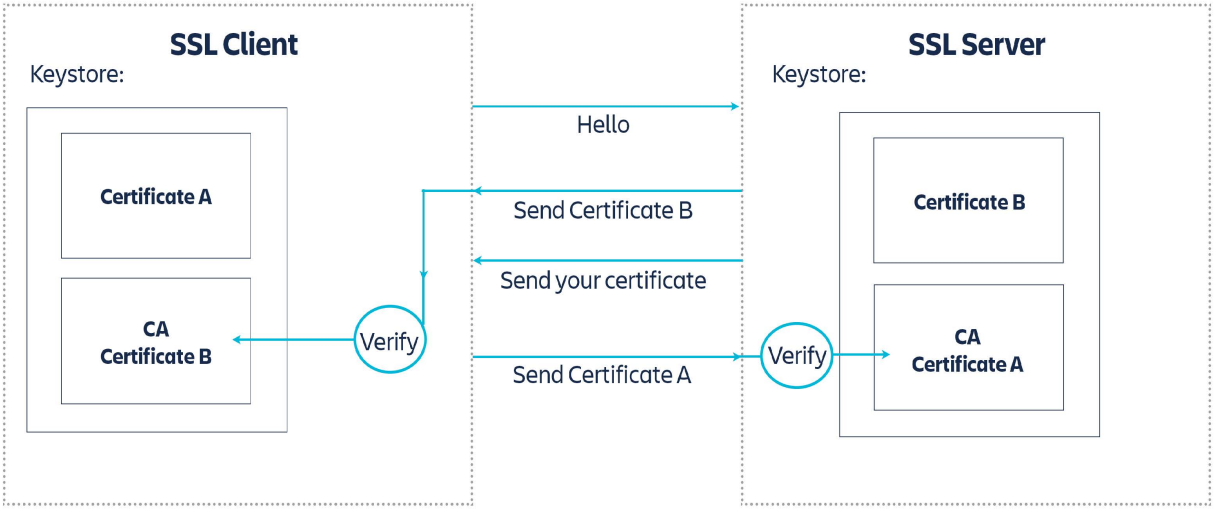
Note: The API token with scopes and OAuth 2.0 (Atlassian service account) authentication methods connect to Jira through api.atlassian.com instead of your Jira site URL. If your Jira Align is self-hosted and your network restricts outbound traffic, allow api.atlassian.com. We recommend using a wildcard, for example, api.atlassian.com/**.

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.

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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**

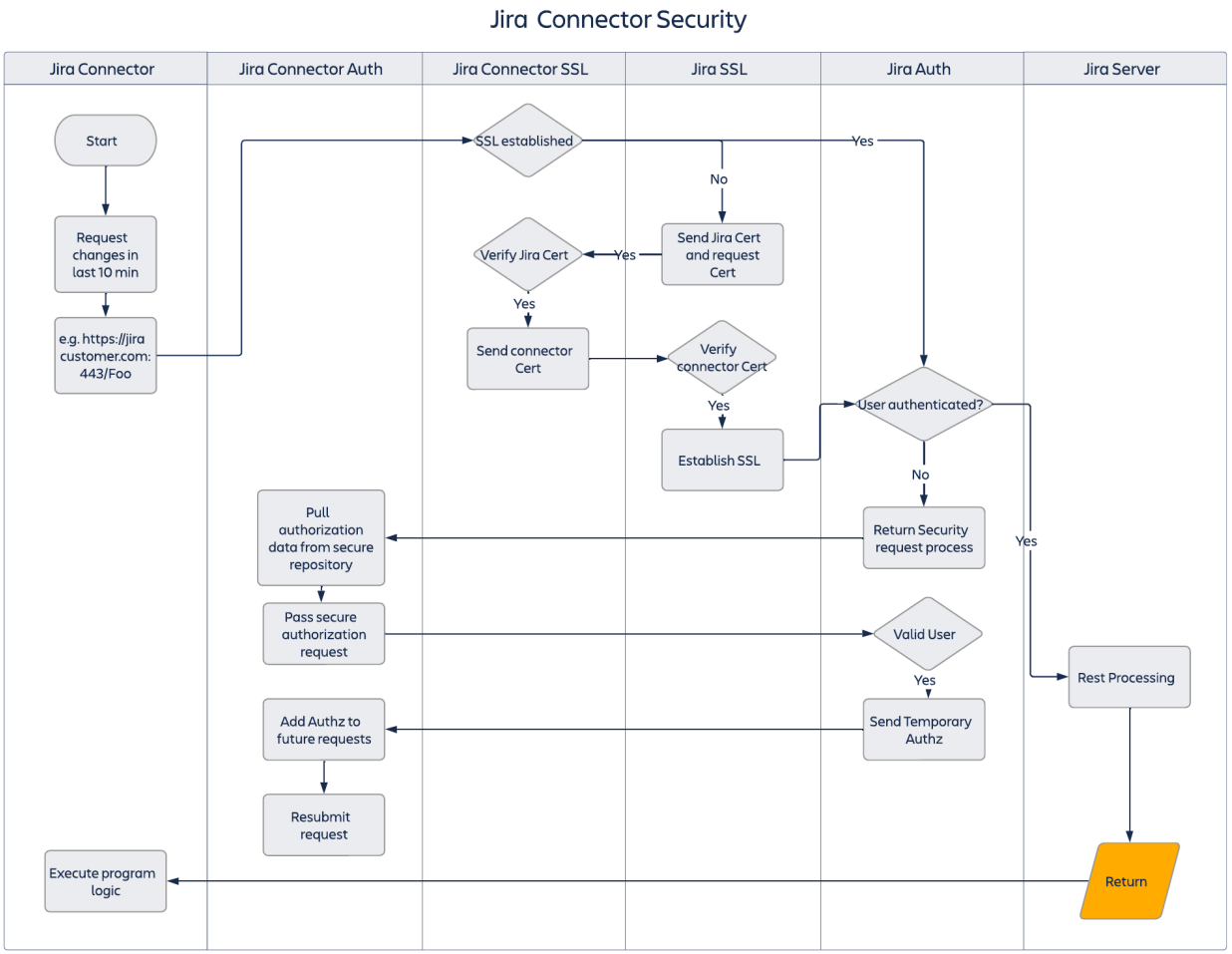
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Note: These are strict requirements because our application cannot support a subset of these.

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.



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.

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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).

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.	SSL allows more precise access control: • Tunnels to specific applications rather than to the entire corporate LAN. • The REST requests over the SSL connections can only access the applications they are configured to access rather than the whole network.
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.

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Authentication workflow

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

To identify roles:

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:

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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 Rest API validation – Test Environment** procedure.
3. Jira Align Ops performs database transfer from the test site to production.

Jira integration data collection

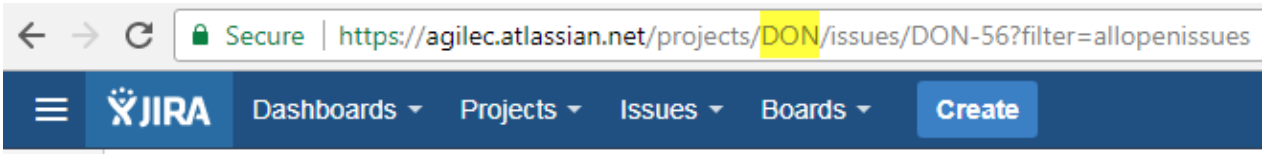
Ensure you have completed all steps in Jira integration prerequisites before proceeding.
Note: You can download an Excel spreadsheet of all of the tables in this article here.

Jira spaces and boards

1. Create a list of Jira space keys and Jira space names that you plan to synchronize to Jira Align. Determine to which Program/Release Train each Jira space maps. Please note each Jira space can only be mapped to one Jira Align Program due to the Jira Align data model which associates Jira spaces to Jira Align programs.

To find a Jira space key:
When logged into Jira, select your space, and then look at the URL. In the URL, you can find the space key:
https://your_jira_name.net/projects/SPACEKEY/

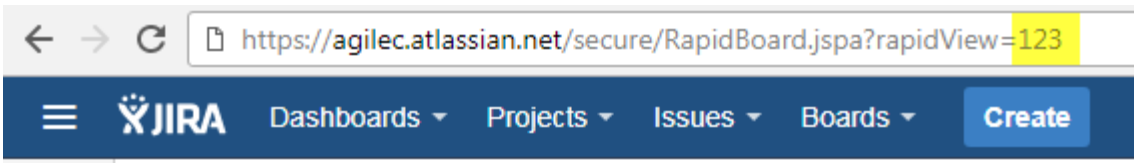
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Space Key	Space Name	Program/Release Train Name
(e.g. MDP)	(e.g.) Mobile Delivery Platform	(e.g. Mobile Release Train)

2. For each space above, c reate a list of Jira Agile Board IDs, which are in the URL for the board, that you plan 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 space, 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:



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

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3. If you use a filter to determine what work items 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 space being mapped.

Jira Space	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.

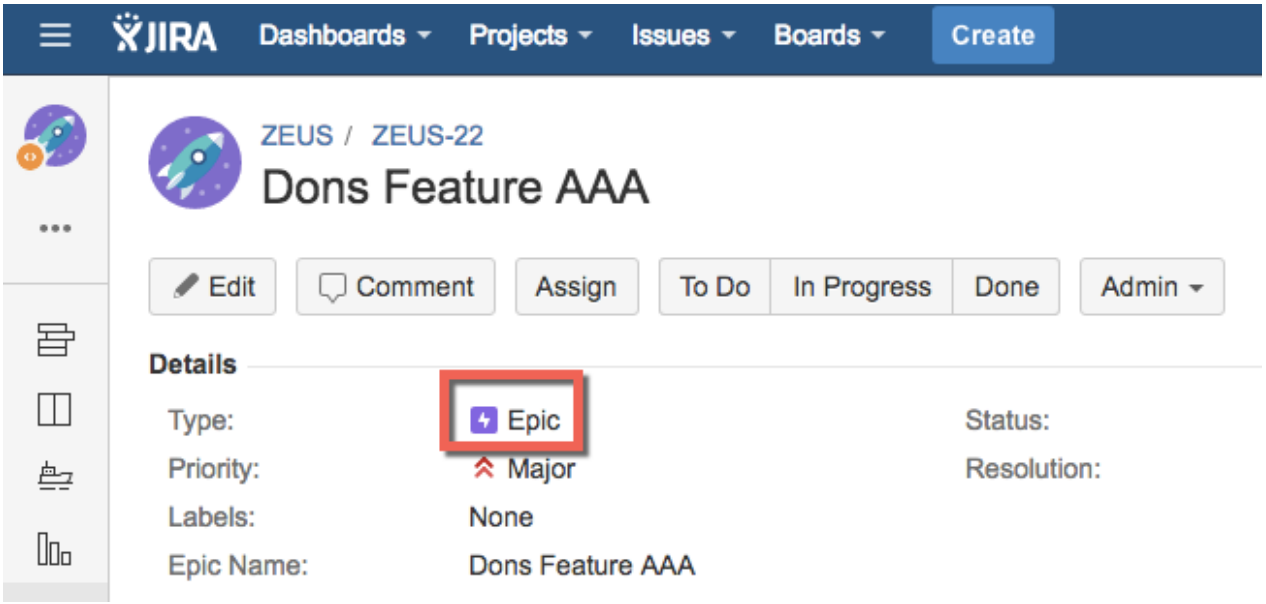
5. Determine the start date (how far back in time) from which you want to import data. This will determine how many historical Program Increments you need to set up in Jira Align.

Date to import from:

Jira custom field IDs and work item type names

1. Record the work item type names for company-managed spaces in the table below. This is a word, not a number, see the example screenshot.

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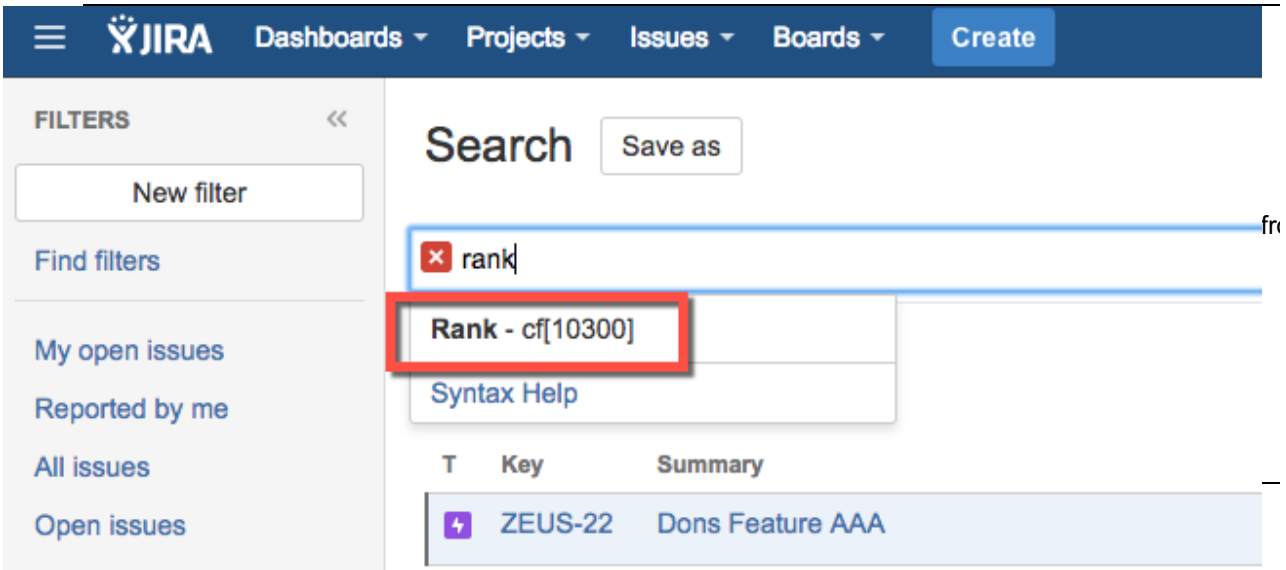


2. Record the work item type IDs for your company-managed spaces in the table below. To find the work item type IDs, follow the instructions outlined here: https://confluence.atlassian.com/jirakb/finding-the-id-for-issue-types-646186508.html

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Jira Work Item Type	Your Work Item Type Name (e.g. Task)	Your Work Item Type ID (e.g. 10000)	Description
Epic			Five-digit work item type ID number and name from J for Epic. * If you're using Jira Data Center and can't find a wor item type called Epic, the work item type name may have been changed.
Story			Five-digit work item type ID number and name from J for Story.
Sub-task			Five-digit work item type ID number and name from J for Sub-Task (or Task).

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 Work Item Search in Jira and start typing the field name. This will show you the Custom Field number as shown in the screenshot below.



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 EpicIDLin
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.
Accepted date			The field name of the value/fl set when a user completes th workflow on an item by clickir the **DONE** button on the worl item screen. * This one can be tricky to fin as it is called Accepted, AcceptedDate, ResolutionDa 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 spaces

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

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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 Ali features. This field 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.

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Team	Optional: Five-digit custom field ID number and name from Jira for Team **Note:** Jira Align supports syncing tl information with either a custom fie of your choice or using the API 2.0 t sync with your Jira instances's built-in team field (the Atlassian **Teams** field for Jira cloud **Shared Teams** for Jira Data Center). Regardless of method, the field's is required to set u syncing this information. If you choose to sy this information wit your Jira instance's built-in team field, make sure to complete data collection to set up the mapping, described in Step 3 of this article.

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Deleted item status	Optional: The Stat value from Jira wh will result in items being permanently deleted from Jira. Use the format **12345** wher filling in the Custor Field ID. * Do not use this if you want to use th recycle bin (two-stage delete) process in Jira Alig ** Regulated indus customers may ha processes to supp requirements arou who may delete items from production/ production support/developme 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 Produ for Jira Align features.
Feature portfolio ask date	Optional: Five-digit custom date picker field ID number an name from Jira for Portfolio Ask date f Jira Align features.

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Feature start / initiation date	Optional: Five-digit custom date picker field ID number an name from Jira for Start / Initiation dat for Jira Align features.
Feature target completion date	Optional: Five-digit custom date picker field ID number an 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 Portfo Ask date for information from Ji Align's Why panel. Use the following format: customfield_123. This is a PUSH ONLY from Jira Ali to Jira. The field in Jira must be read-only. Some Jira configurations may make the Why field appear editable, bu any changes made will be overwritten the next sync with Jira Align.

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Parent feature name	Optional: Five-digit custom field numb and name from Jira for a parent item fo Jira Align features (either an Jira Align capability or epic). This is a PUSH ONLY from Jira Ali to Jira. The field in Jira must be non-editable by anyone except admin/Jira Align integration ro
Jira Align PI	Optional: Five-digit custom field numb and name from Jira for Jira Align Program Incremen This is a PUSH ONLY from Jira Ali to Jira. The Jira fie must be non-editab by anyone except admin/Jira Align integration role.
T-shirt	Optional: Five-digit custom field numb and name from Jira for T-shirt sizing. This is a PUSH ONLY from Jira Ali to Jira. The Jira fie should be a select list (single option) field.

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Capability parent	Optional: Five-digit custom field numb and name from Jira for a capability's parent epic, to display on Jira Alig features where capabilities are enabled. This is a PUSH ONLY from Jira Ali to Jira. The Jira fie must be non-editab by anyone except admin/Jira Align integration role.
Work code (features only)	Optional: Five-digit custom field numb 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 Criteri
Type (features only)	Optional: Five-digit custom field ID number and name from Jira for Type Jira Align features.
Priority (features only)	Optional: Five-digit custom field ID number and name from Jira for Priorit on Jira Align features.

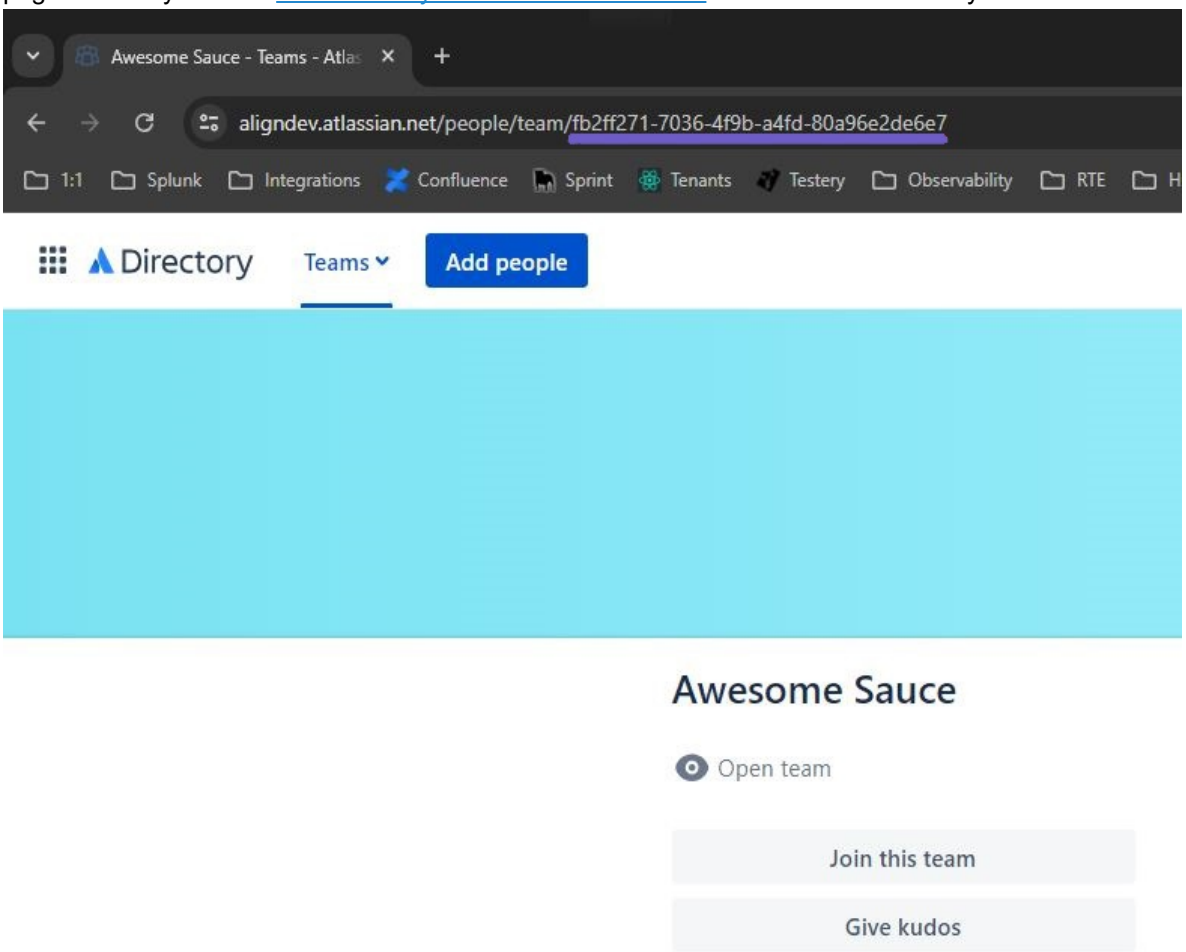
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Text input custom fields	Optional: Five-digit custom field ID number and name from Jira for a text input custom field you'd like to sync c Jira Align features. Duplicate this row add information about additional te input custom fields
Single-select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

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- 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 add Atlas to your Jira Cloud instance if it's not added already.

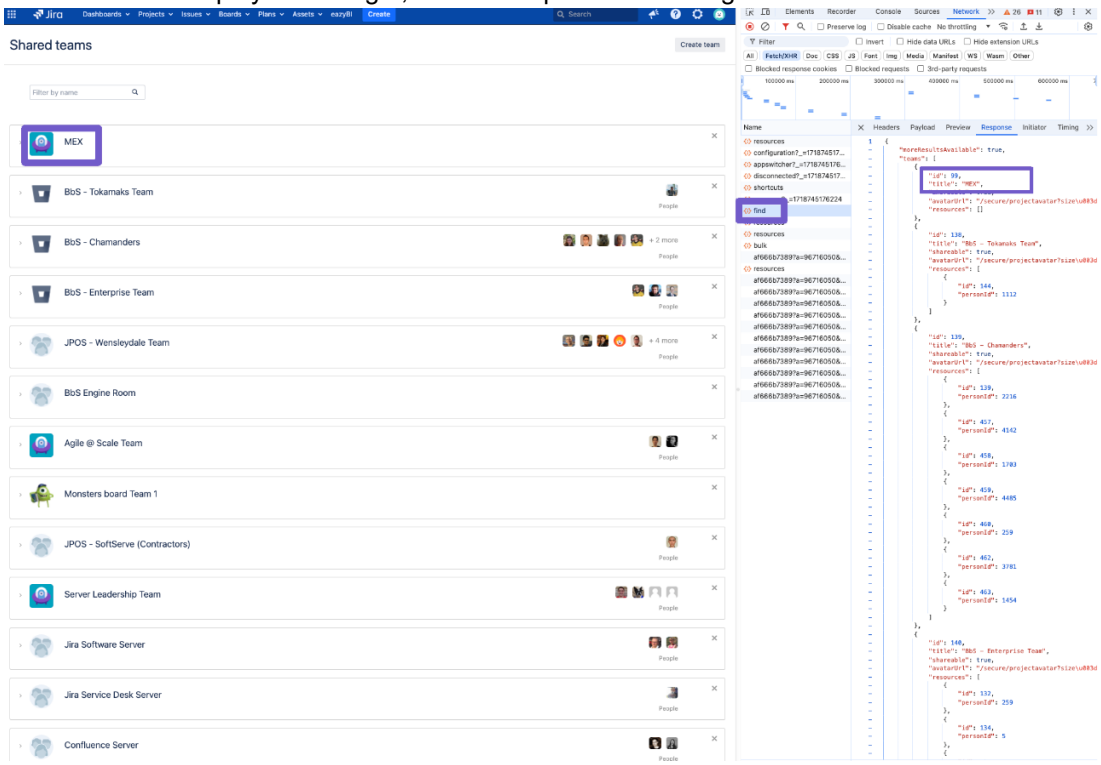


Alternatively, use the Jira API to send a **POST gateway/api/v4/teams/search** call to return a list of all teams, including their IDs. Replace the organization ID and site ID with your own instance's organization ID and site ID:

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

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- 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 work item types (anything that is not an epic, story, or bug) that you want to synchronize with Jira Align stories in your company-managed spaces. These work item types will synchronize to Jira Align as stories with a specific type.

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Custom Work Item Type	Your Work ITem Type Name (e.g. Spike Story)	Your Work Item Type ID (e.g. 10000)	Intend Use

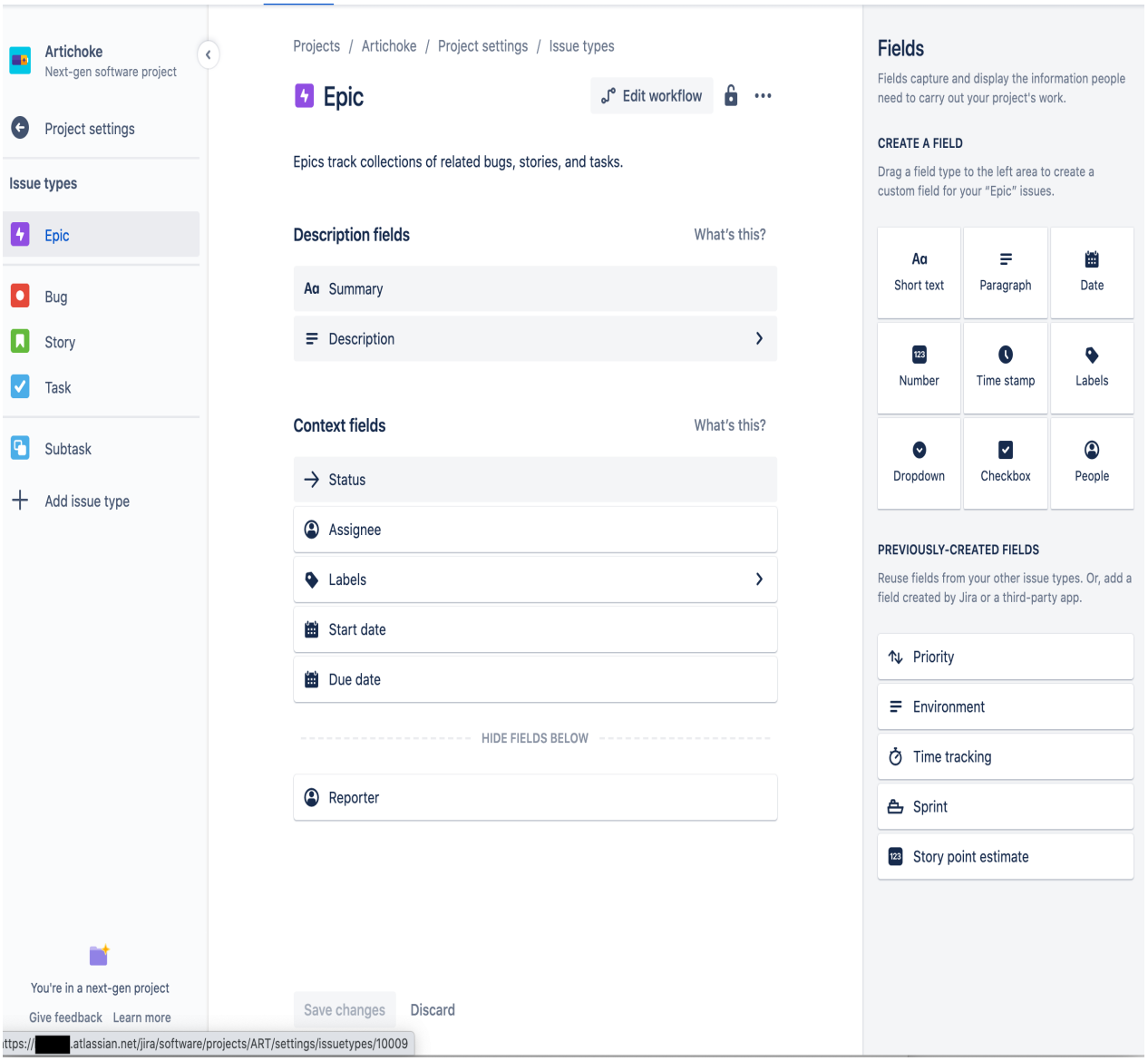
5. Create a list of custom work item types (anything that is not an epic, story, or bug) that you want to synchronize with Jira Align features in your company-managed spaces. These work item types will synchronize to Jira Align as features with a specific type.

Custom Work Item Type	Your Work Item Type Name (e.g. Spike Story)	Your Work Item Type ID (e.g. 10000)	Intend Use

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

You can locate individual work item type IDs for team-managed spaces on the space's **Space Settings** > **Work Item Types** page by hovering over the work item 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.

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

Additional fields for team-managed spaces

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.

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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)	Work Item Link Type ID (e.g. 10000)	Intended Use
Capability parent		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.

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

Item	Required on Epic (Yes/No)	Required on Story (Yes/No)	Requir on Defect (Yes/N
Program increment text field			
Points on epic?		N/A	N/A
Is Team required when an item is created?			
Is Reporter required when an item is created?			
Acceptance criteria			
Sync State bidirectionally?			
Sync Work Item bidirectionally?			
Feature portfolio ask date			
Sync Rank bidirectionally?			N/A
Feature start / initiation date			
Feature target completion date			

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.

Optional: Five-digit custom tex field number and name from Jira for Jira Align Program Increment.

Optional: Five-digit custom field ID number and name from Jira for Acceptance Criteria.

Optional: Five-digit custom date picker field ID number and name from Jira for Portfolio Ask date for Jira Align features.

Optional: Five-digit custom date picker field ID number and name from Jira for Start / Initiation date for Jira Align features.

Optional: Five-digit custom date picker field ID number and name from Jira for Target Completion date for Jira Align features.

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Jira integration setup

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

- Set up program increments and sprints
- Preparing for connector setup in Jira Align
- Establish connection
- Map spaces to programs
- Enforce Jira space selection
- Map boards to teams
- Configure timers, work items, and fields
- Configure field management settings
- Pull Jira user data
- Set up team-managed spaces
- Map statuses to states
- Sync existing work items
- Check connector activity
- Authentication types
- Jira setup fields
- Viewing logs
- Manage custom fields

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.

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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**  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 **Jira sprint mapping buffer days** field, type the number of buffer days you'd like to use.

We recommend setting the Jira sprint mapping 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:

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1. Select the **Settings gear**  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 space 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 Jira integration data collection.

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

Establish connection

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1. Select the **Settings gear**  in the top navigation bar.On the left side of the page, select **Jira Settings** in the **Connectors** section.
2. 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.

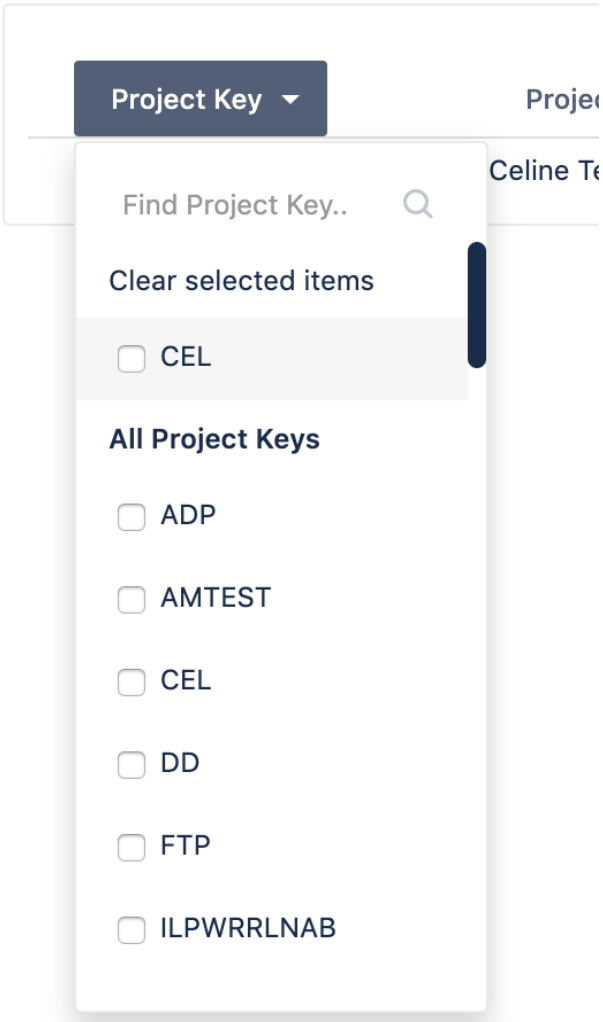
   a. Select **Jira Connectors** (top-right of the page), and then select the necessary Jira connector from the corresponding dropdown menu.
   b. In the **Jira Link** field, type the URL to connect to Jira, for example, https://jiraalign.atlassian.com/browse/{external}.
   c. In the **Admins** field, you 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 here. 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 spaces to programs

1. To add Jira spaces, select **Add Space** on the **Manage Spaces** tab, and then complete the fields in the table. Use the information you collected in Jira integration data collection.
   - **Space Key:** Type the Jira space key.
   - **Space Name:** Type the Jira space name. You can enter any name to identify the space, but using the exact space name is recommended. This name does not sync to or from Jira.
   - **Program:** Select the Jira Align program your Jira space will map to.
2. Select **Save**.

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1. Select the column name.



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.

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

Enforce Jira space selection

The **Enforced Jira Space** setting lets you require that all features created within a specific program are automatically or manually assigned to a single Jira space. This setting helps you prevent features from being assigned to the wrong Jira space, making it easier to keep your work organized and your integration consistent.

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When this setting is enabled and the **Jira Space** field is required in details panel settings, every new feature in the program will be assigned to the enforced Jira space.

When the setting is enabled and the **Jira Space** field is not required, features' Jira Space field will only allow selection of the enforced Jira space.

To enable the enforced Jira space setting for a Jira space mapping:

1. Go to the **Manage Spaces** tab in Jira connector settings.
2. In the **Space Key** column, select the space key of the Jira space you want to enforce.
3. In the slide-out panel that displays, switch on the **Enforced Jira Space** setting.
4. Select **Save**.

Note: Only one Jira space can have the enforced Jira space setting enabled per program.

Map boards to teams

Perform team mapping and use the information you collected in Jira integration data collection:

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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 space is found, a yellow **warning**

   icon will appear next to the Space Key and the Jira Board column will not fill. Point to the icon to see the work item 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 space.
   - The board has a filter share with multiple spaces.
   - The board does not have a space location in Jira's cloud version or does not have at least one shared space 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, work items, 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 Work Item Types tab, and then complete the fields in this section:
   a. Jira custom work item types are converted to stories in Jira Align and can be assigned a different type. In this section, select **Add** and map work item Type IDs in Jira to the corresponding Story Types in Jira Align. Select the necessary Jira connector for each work item type.
   Note: You can set up story types in the **Settings** > **Platform** > **Dropdowns** section.
5. Select **Save**.
6. Team-managed spaces contain work item types that are space-specific. To set up fields for team-managed spaces, see the Set up team-managed spaces 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

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fields, as well as custom fields 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.





▶ ▼ **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.

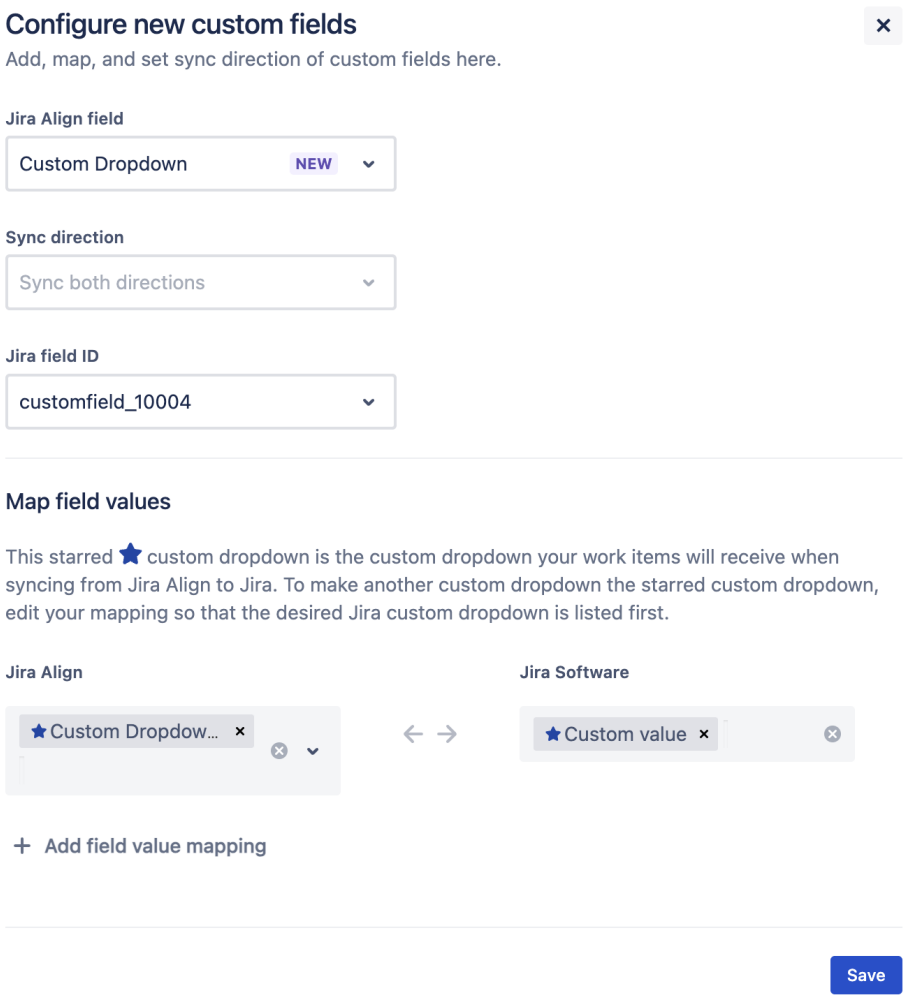
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5. Several fields require you to map field values in the **Map field values** section before they can sync between Jira and Jira Align.

▶ ▼ **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.



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.**
10. 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.

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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 Atlassian Guard authentication option 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 spaces

Your Jira instance may consist of a combination of company-managed and team-managed spaces. Team-managed spaces contain unique states, custom field IDs, and work item type IDs, so they must be set up individually. To set up a team-managed space with the connector:

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1. Open the **Manage Spaces** tab.
2. In the **Space Key** column, select the space key of the team-managed space to view its details.
3. In the slide-out that displays, open the **Team-managed space settings** tab.
   Note: This tab only displays on the slide-out when a space is a team-managed space.
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 Work Item Type Name and Jira Work Item 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 team-managed spaces contain unique statuses that must be mapped to states individually.

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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 work item 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 space.
   Note: If a space 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 custom JQL query 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 space to ensure that all statuses are mapped to a state or process step. You can also push the mappings to all company-managed spaces using the **Update other Jira spaces** option.
3. Select **Save**.

Sync existing work items

1. Open the **Jira Integration** tab, and then run the Jira JQL query to immediately synchronize work item types, steps, and sprints for a certain period. Run the data synchronization back through the start date you identified in Jira integration data collection:
   a. In the **Spaces** field, select the Jira spaces to include in the query. Leaving this field blank will include all spaces 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 Space = 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.

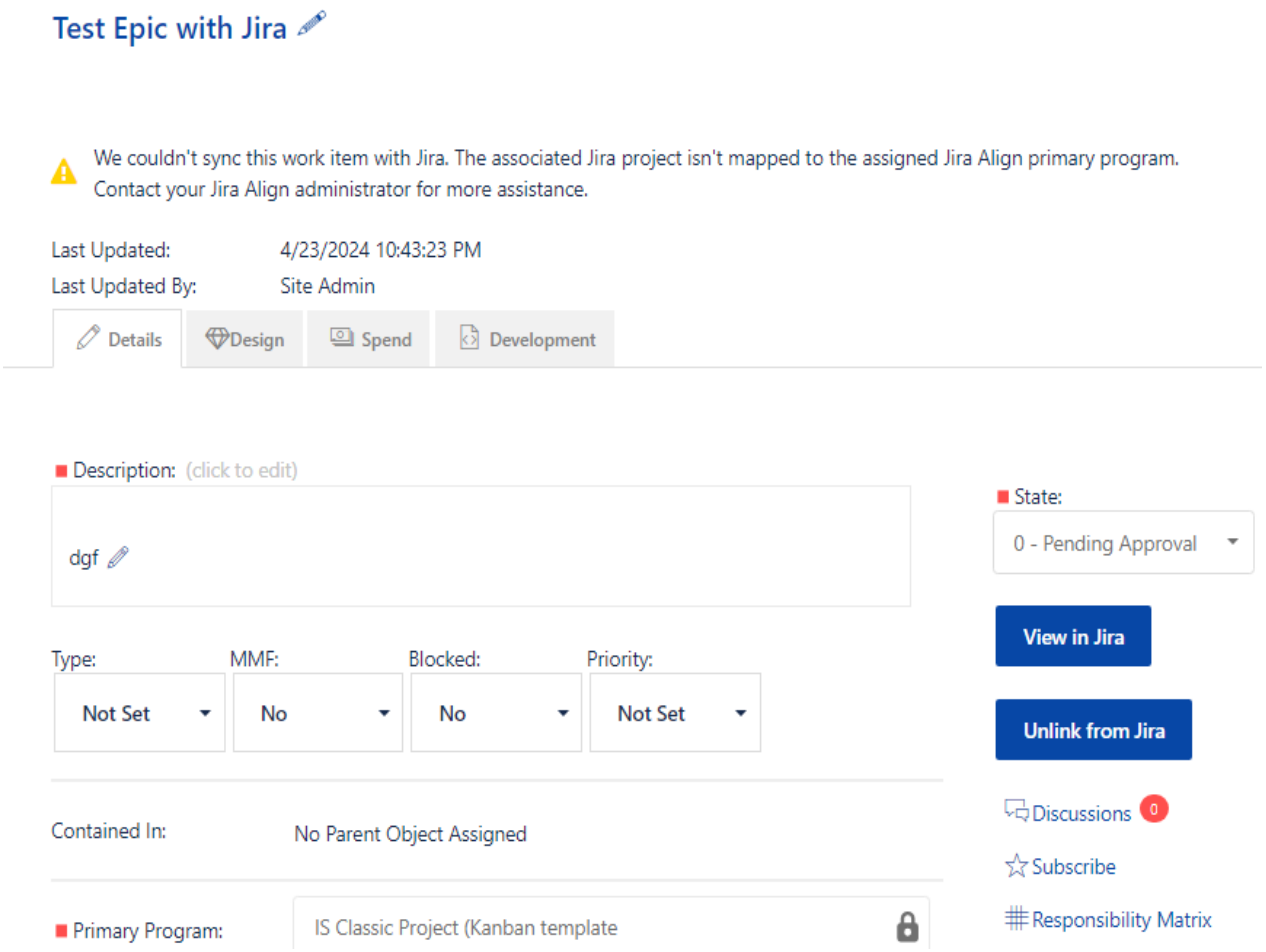
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Check connector activity

1. Check the Jira audit logs for any issues:
   a. On the **Manage Spaces** 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 work item, the work item's details panel will include a **View in Jira** button, which will open the linked Jira work item 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.



▶ ▼ **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 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 work item will create a new work item in Jira Align.

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Authentication types

The connector authenticates against the Jira REST API using the authentication type you select in the connector settings. The types you can use depend on your Jira deployment.

Choose an authentication type

Use the following table to choose an authentication type:

Authentication type	Use with	What you need
API token with scopes (recommended)	Jira Cloud	An Atlassian account and an API token with the required scopes
OAuth 2.0 (Atlassian service account) (recommended)	Jira Cloud	A client ID and client secret from an Atlassian service account
API token	Jira Cloud	An Atlassian account and an API token
OAuth 1.0	Jira Cloud and Jira Server/Data Center	An application link in Jira
PAT	Jira Server/Data Center	A personal access token

We recommend **API token with scopes** or **OAuth 2.0 (Atlassian service account)** for Jira Cloud, because both limit the connector to the scopes it needs.

Notes:

- OAuth 2.0 (Atlassian service account) isn't available on Atlassian Government Cloud. Use API token with scopes instead.
- API token with scopes and OAuth 2.0 (Atlassian service account) aren't available for Jira sites on a custom domain in Atlassian Isolated Cloud.
- If your Jira Align instance is self-hosted, contact Atlassian Support to enable API token with scopes and OAuth 2.0 (Atlassian service account).
- Cookie-based (deprecated) authentication is deprecated and will be removed in the future in accordance with the Atlassian REST API policy.
- Jira has deprecated OAuth 1.0 for the Jira Cloud REST API. For connections to Jira Cloud, we recommend API token with scopes or OAuth 2.0 (Atlassian service account) instead.

Before you begin: create your credentials

Create the credentials for your authentication type before you set it in Jira Align. For OAuth 1.0, set the

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authentication type first, and then follow **Configure OAuth 1.0** below.

API token with scopes

To create an API token with scopes:

1. Sign in to the Atlassian account the connector will use. We recommend a dedicated account for the integration. See Jira integration prerequisites.
2. Create an API token with scopes by following Manage API tokens for your Atlassian account. Select **Jira** as the app, then select all 17 required scopes.
3. Copy the token and store it somewhere secure. You can't view the token again after this step.

OAuth 2.0 (Atlassian service account)

An Atlassian service account is an account that isn't associated with a person, so the connection doesn't depend on any one user's account or password. An organization admin for your Jira Cloud site must complete these steps.

To create an Atlassian service account and its credential:

1. Create a service account. See Understand service accounts.
2. Give the service account the **User** role for Jira.
3. Create an OAuth 2.0 credential for the service account, and select all 17 required scopes. See Create an OAuth 2.0 credential for service accounts.
4. Copy the client ID and client secret and store them somewhere secure. You can't recover them after you create the credential.

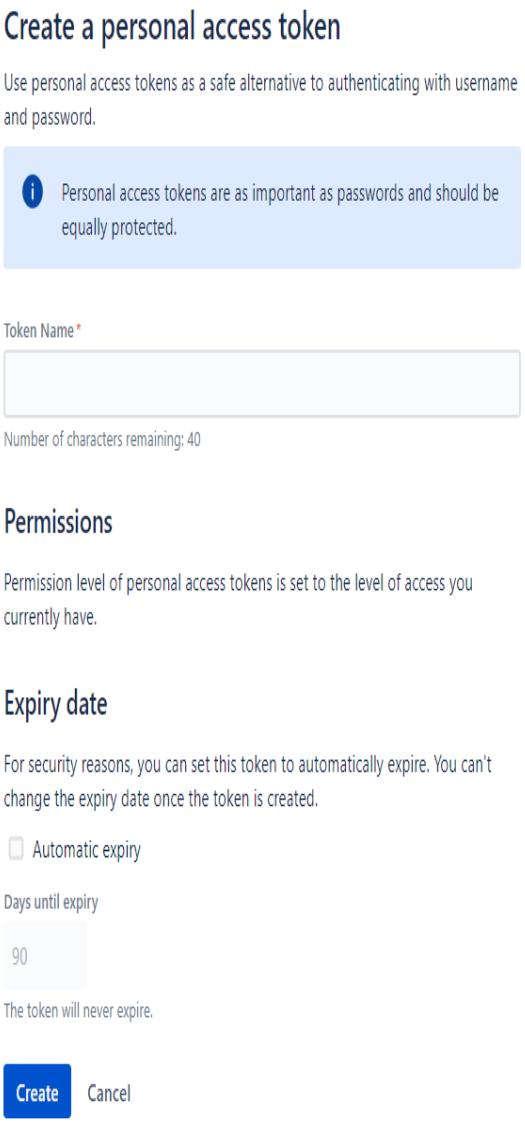
API token

To create a token, refer to Manage API tokens for your Atlassian account.

PAT

You can use a personal access token (PAT) to authenticate into the Jira API. When creating the PAT in Jira, make sure to uncheck the **Automatic expiry** checkbox.

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Set the authentication type

To set the authentication type for a connector:

1. From the **Authentication Type** dropdown menu (see step e of **Establish connection** above), select your authentication type.
2. Complete the fields for your authentication type. See the following table.
3. Select **Save**.
4. If you selected **OAuth 1.0**, continue with **Configure OAuth 1.0** below.

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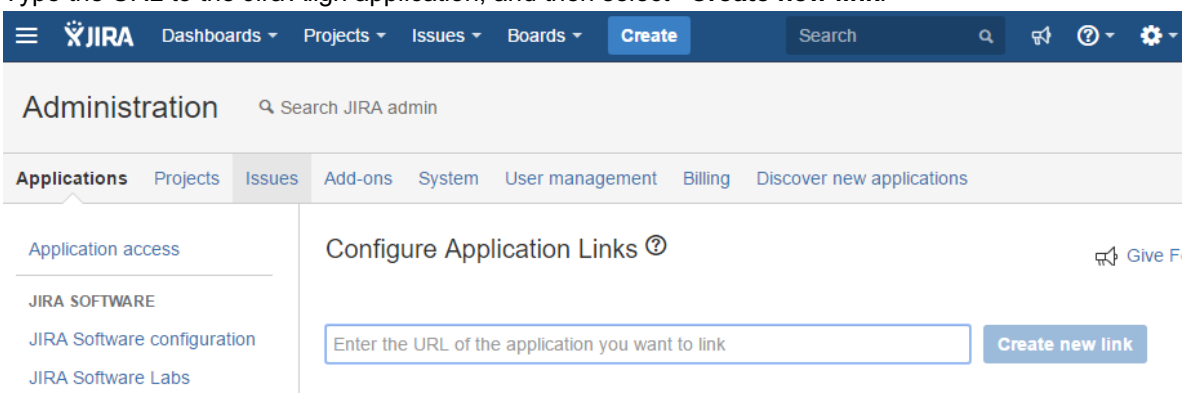
Authentication type	Fields to complete
API token with scopes	Type the user name and token of the user whose credentials you plan to use for the connection.
OAuth 2.0 (Atlassian service account)	Type the client ID and client secret in the **Jira OAuth 2.0 client ID** and **Jira OAuth 2.0 client secret** fields.
API token	Type the user name and token of the user whose credentials you plan to use for the connection.
OAuth 1.0	In the **Jira OAuth Consumer Key** box, type a consumer key of your preference, for example, JiraAlignOAuth. **Note:** Do not use spaces.
PAT	Type the PAT of the user whose credentials you plan to use for the connection.

Note: API tokens, with or without scopes, expire after a maximum of 90 days in Atlassian Commercial Cloud, and 365 days in Atlassian Isolated Cloud and Atlassian Government Cloud. Before a token expires, create a new one and save it in the connector settings.

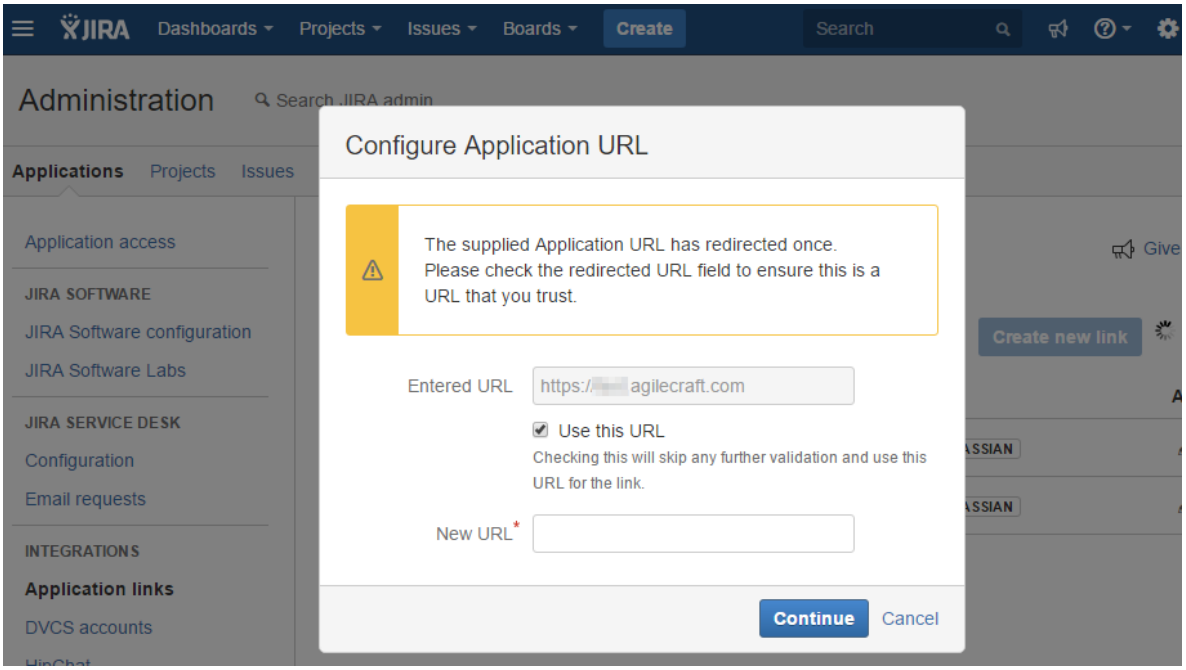
Configure OAuth 1.0

Jira uses Application Links to allow and manage OAuth. After you select **OAuth 1.0** and save your consumer key:

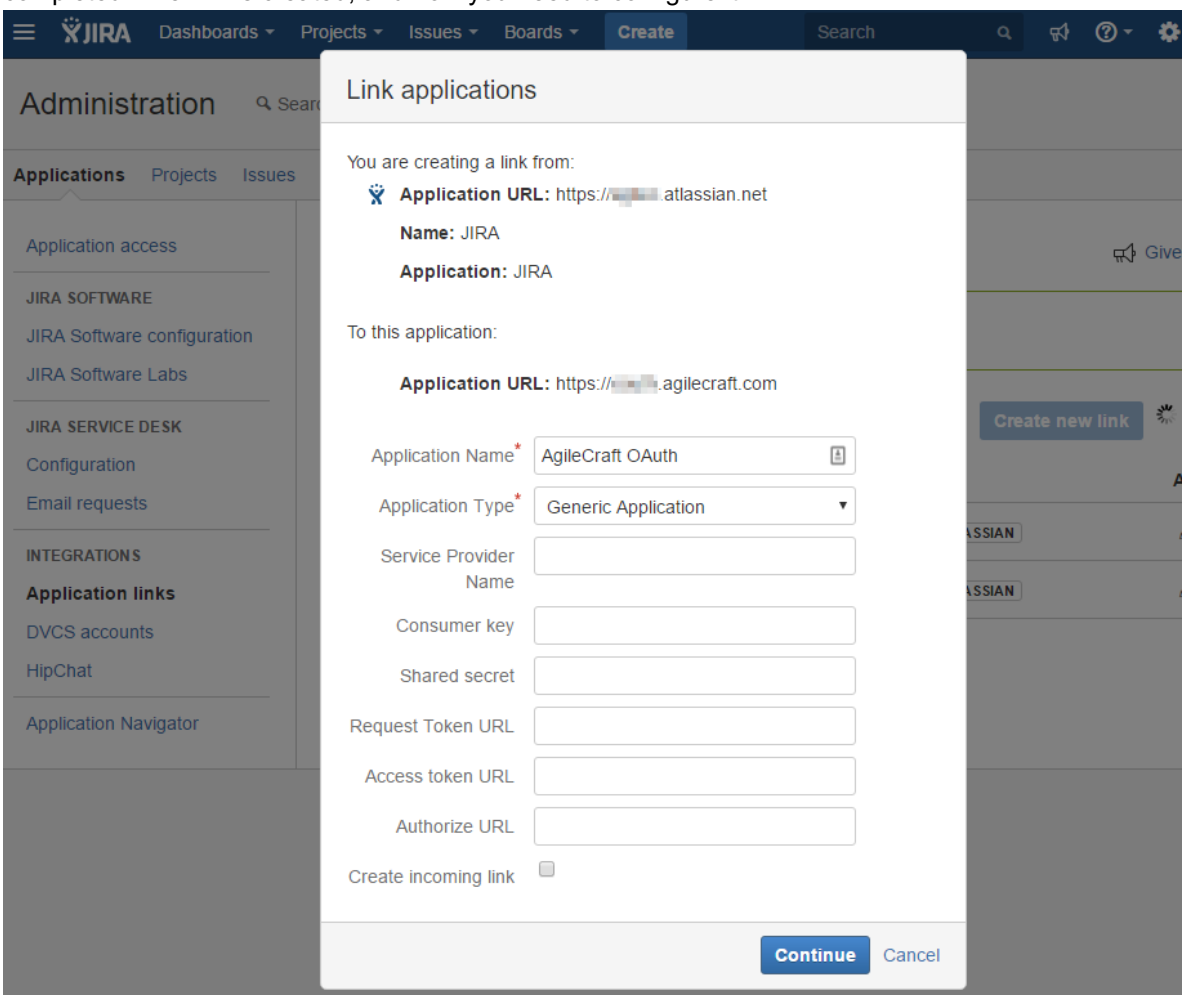
1. Select **Generate OAuth Public Key**.
2. Sign in to Jira as a service administrator, and then go to **Administration** > **Applications** > **Integrations** > **Application links**.
3. Type the URL to the Jira Align application, and then select **Create new link**.



4. Select the **Use this URL** check box, and then select **Continue**.



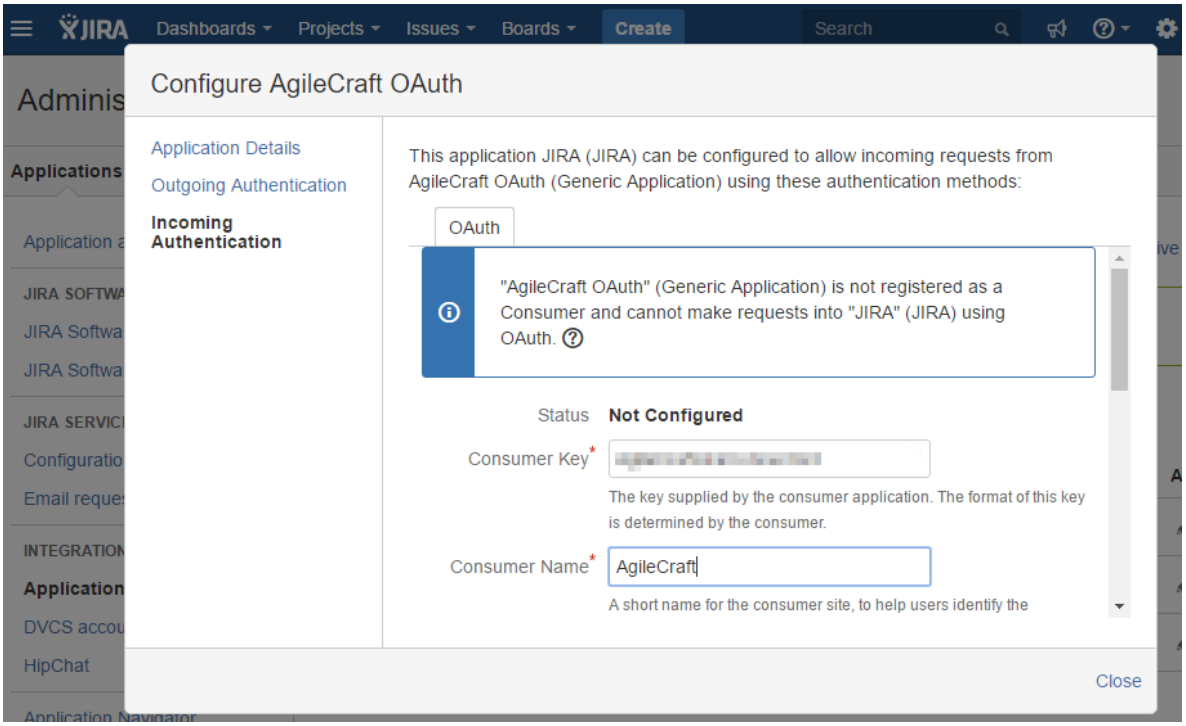
5. In the **Link applications** dialog box, type an application name of your preference, make sure **Generic Application** is selected for the **Application Type**, and then select **Continue**. No other fields need to be completed. The link is created, and now you need to configure it.



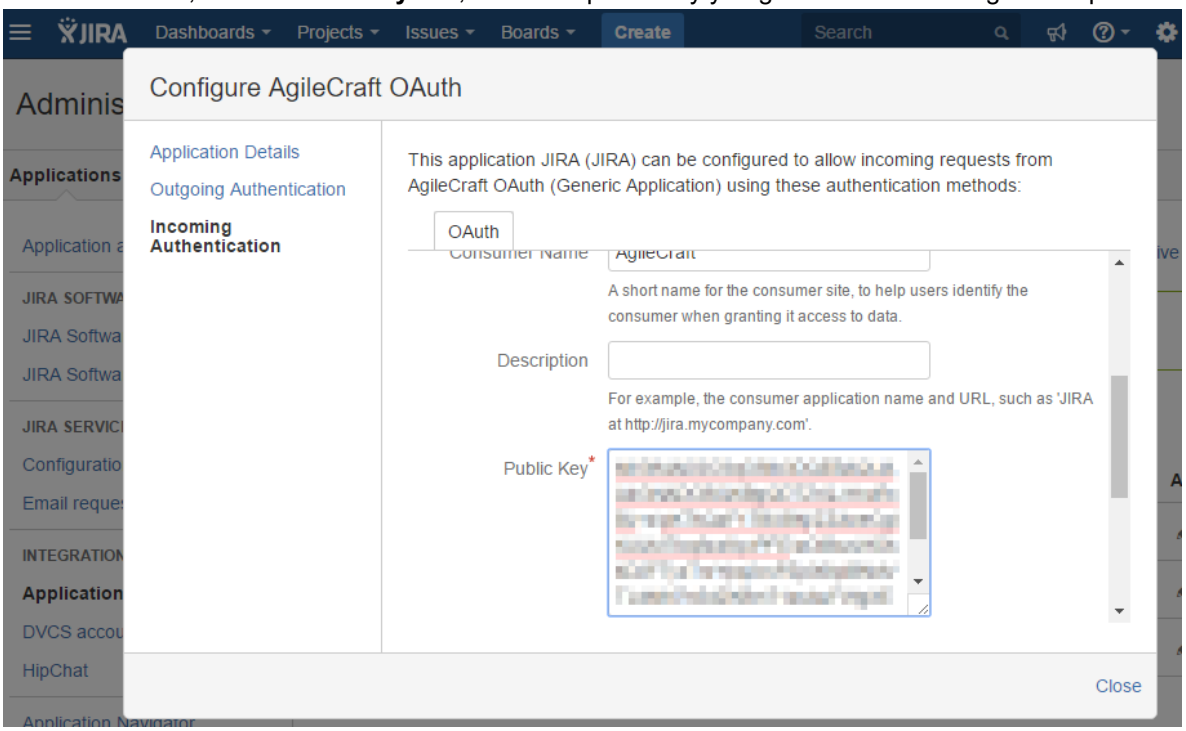
6. Select the pencil icon next to the link you created, and then select **Incoming Authentication**.

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7. In the **Consumer Key** box, type the consumer key you created in Jira Align.



8. Type a consumer name of your preference.
9. Scroll down and, in the **Public Key** box, insert the public key you generated in Jira Align in Step 1.



10. Select **Save**.
11. Go back to Jira Align, and then select **Authorize Jira OAuth access**. Wait for the Jira connector to run. It runs even if deactivated.
12. 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**.
13. 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**.

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14. 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.

Required scopes

The API token with scopes and OAuth 2.0 (Atlassian service account) authentication options both require the same 17 scopes. Select all of them when you create the API token or the service account's credential. If any are missing, the connector won't work.

Classic scopes:

- manage:jira-configuration
- manage:jira-project
- read:jira-user
- read:jira-work
- write:jira-work

Granular scopes:

- read:board-scope:jira-software
- read:board-scope.admin:jira-software
- read:issue-details:jira
- read:jql:jira
- read:project:jira
- read:sprint:jira-software
- write:board-scope:jira-software
- write:epic:jira-software
- write:issue:jira-software
- write:sprint:jira-software
- delete:issue:jira
- delete:sprint:jira-software

To filter the scope picker to these scopes, copy the following list and paste it into the scope search when you create the token or credential:

```
manage:jira-configuration,manage:jira-project,read:jira-user,read:jira-work,write:jira-work,read:board-scope:jira-software,read:board-scope.admin:jira-software,read:issue-details:jira,read:jql:jira,read:project:jira,read:sprint:jira-software,write:board-scope:jira-software,write:epic:jira-software,write:issue:jira-software,write:sprint:jira-software,delete:issue:jira,delete:sprint:jira-software
```

The list only filters the picker. After you paste it, select each of the 17 scopes.

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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 work items synchronize with Jira Align, between 3 and 120 minutes. Jira Align queries data based on the Jira space and work item type combinations it is configured for. Running a work item 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.

Work item types

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

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- **Feature work item type**. The numeric ID (required) and name (optional, informational only) for the work item type that is used as an epic in Jira company-managed spaces.
  Note: Team-managed spaces contain unique work item type IDs that must be mapped individually (see the Set up team-managed spaces section).
- **Story work item type**. The numeric ID (required) and name (optional, informational only) for the work item type that is used as a story in Jira company-managed spaces.
  Note: Team-managed spaces contain unique work item type IDs that must be mapped individually (see the Set up team-managed spaces section).
- **Defect work item type**. The numeric ID (required) and name (optional, informational only) for the work item type that is used as a bug in Jira company-managed spaces.
  Notes:
  - Bidirectional sync of defects only supports one Jira work item type. The entry in the ID field determines what work item 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 spaces contain unique work item type IDs that must be mapped individually (see the Set up team-managed spaces section).

Custom Fields

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

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- **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 spaces. 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 work item. 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 built-in Jira team field, 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 work item type in Jira. This is a default priority that the connector will set on the newly-created work item 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 work item 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.

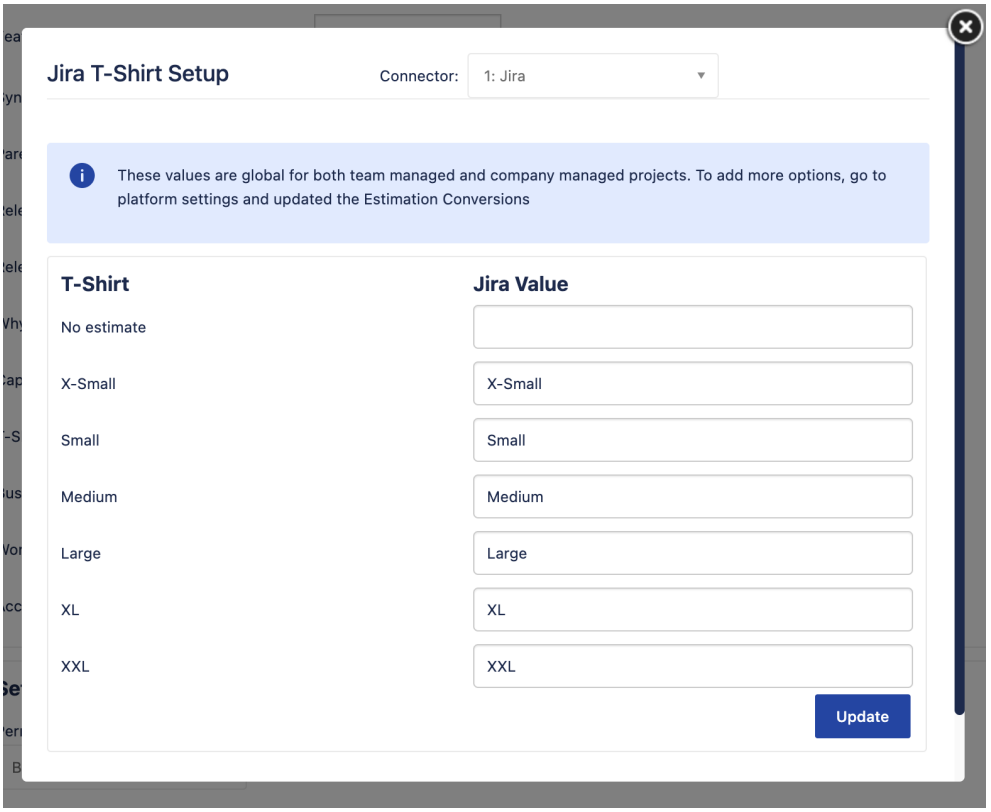
- **Sync Jira resolver name on stories**. Select whether to sync information from Jira to Jira Align on which user accepted/resolved stories in Jira. We recommend setting this to **No** for faster connector performance.
- **Jira change log resolution label**. The label name in the change log in Jira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

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- **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.

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- **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.



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 Estimation Conversions menu 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 t-shirt estimate.

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- **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 work item 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.
- **Lock Feature State and Process Step in Jira Align once linked to a Jira work item**. Select **Yes** to make the **State** and **Process Step** fields read-only in Jira Align for features linked to a Jira work item. Jira becomes the source of truth, so you change the values in Jira and the next sync brings them into Jira Align. The lock applies everywhere in Jira Align, including boards, bulk updates, spreadsheet imports, and the REST API. When the lock blocks a bulk update, import, or automatic state change, the feature's audit log records the blocked change.
- **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** work item 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** work item 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 a work item in Jira to have a Reporter and Assignee when it is created. When enabling this setting please ensure that the Jira Work Item 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 work item, and assignable user permissions on the corresponding Jira space.

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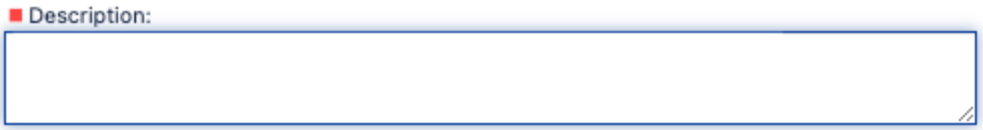
- **Is your Jira Team field a cascading select list?** Select **Yes** if the Custom Team field in Jira is a cascading field and **No** if the Custom Team field in Jira is a single or multi-select field. The parent and child relationships are set up in Jira Align under **Manage Custom Fields** > **Sync 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 spaces mandatory when creating items**. Select **Yes** to make the **Jira Space** option required when you create working items in Jira Align, for example, features.
- **Assign features to multiple Jira spaces in Jira Align.** Select **Yes** to allow selecting multiple Jira spaces for the same program when you create or edit the feature in Jira Align. Setting this to **Yes** will sync features with multiple Jira spaces from Jira Align to Jira only, regardless of other connector settings.
- **Assign Jira users to Jira Align teams when associated with stories and defects**. Select **Yes** to allow Jira to check which work items the users are associated with and automatically add users to the team to which these work items 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 allocation values, and any existing manually-set values will not be affected by 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.
- **Sprint mapping logic.** Select whether to map sprints by their board order or by their end dates. **Important:** Once set to **Map sprints based on their end dates** , you won't be able to switch back to mapping by board order, and Jira sprints without end dates won't be synced. If your Jira Align instance syncs with version 8.8 or earlier of Jira Data Center, you should always use set this setting to **Map sprints based on their board order,** since these versions don't support end dates.
- **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.
- **Story sprint assignment sync direction**. Select **Bidirectional** 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.

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- **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 spaces/boards/Jira Align teams, the field will sync the Jira **Space** 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 work items to Jira Align work item**. Select **Bidirectional sync** to create Jira work item 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 work items 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 Jira integration data collection.
- **Jira text formatting type**. Select 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:

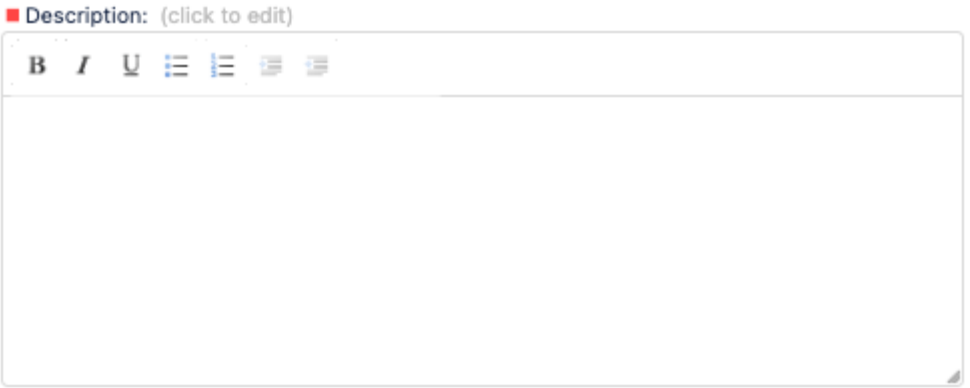
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- **None (plain text)** synchronizes the text as-is.

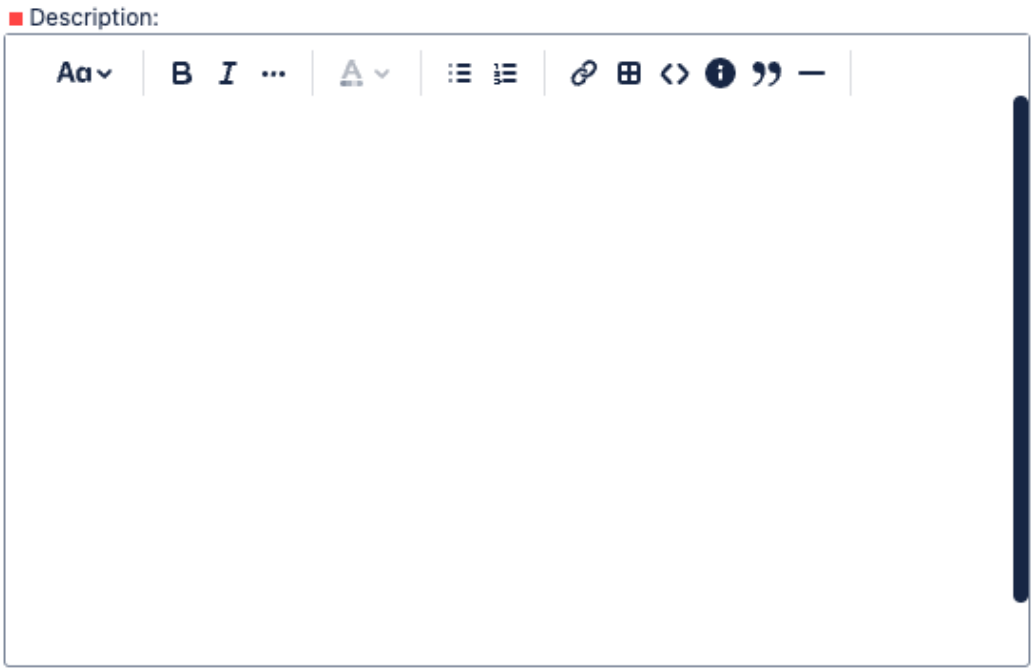


Note: Jira Align environments will sync wiki markup feature descriptions for features in programs synced with Jira, even if this setting is set to **None**.

- **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.

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- **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.

Notes

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 space is selected on Jira Align release vehicles, the release vehicle will sync to Jira as a fix version on the corresponding Jira space.
- Yes/Yes – The fix version will drive both the PI and the release vehicle.

Viewing logs

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

- Configuration
- Jira API
- Work Items
- 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:

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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 Spaces** 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** > **Work Items** > **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 spaces use different team custom fields for selecting teams in each space, you must map each custom field by space and associated teams.

To sync Jira team values with Jira Align teams:

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1. Under **Sync Jira Team Values with Jira Align Teams**, select **Add New**.
2. Select the Jira space 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.
4. If it is a dropdown menu, type the custom field value in the corresponding box. Use the format: customfield_#####, where ##### is the team custom field ID in Jira.
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 spaces 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 spaces, 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 work item links from Jira and convert them into dependencies in Jira Align.

To set up Jira link actions:

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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 default Jira work item links. **Story/Task Link** allows the linkage of a Jira custom work item type to a Jira Align task. We recommend this link type for custom work item links.
5. If the link action is a story/task link, type the work item type ID used for tasks in Jira in the **Work Item ID** text field.
6. Select **Update Link**.

After the setup, the work item 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 work item 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 story link report 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**  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 work items

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 space is associated with a Jira Align program on the the Jira Settings page.
2. Next, access the Jira Management page. Select the **Settings gear**  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.

   You can click these sprint counts to view details about them and resolve any issues on the Jira Sprints tab.
9. In the **Jira Align Program** cell, select the board's associated program. This should match the program that the board's space 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.

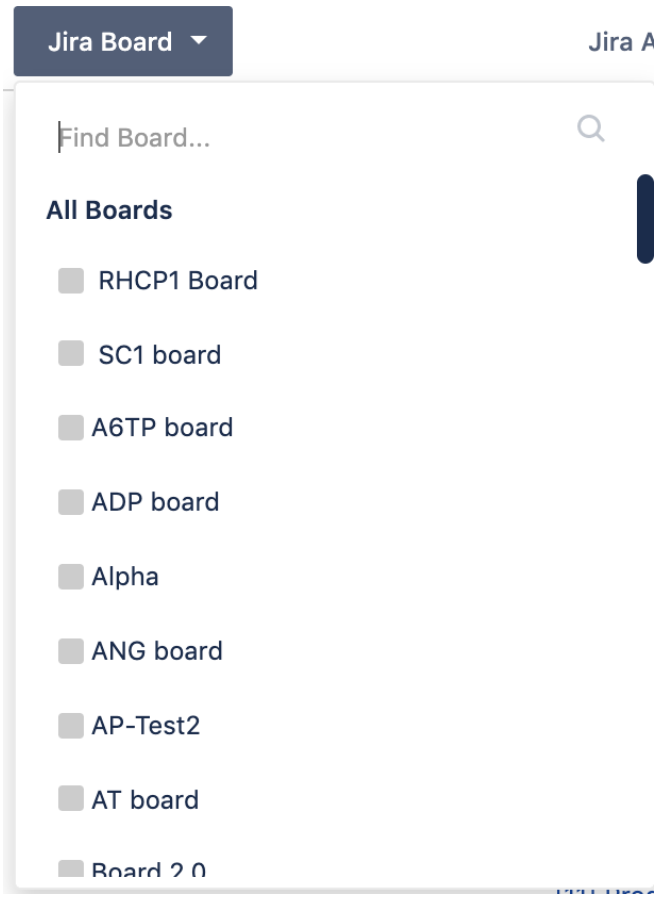
*We recommend only syncing sprints created on the board to ensure sprints are aligned correctly from Jira to Jira Align. Jira Align uses placeholder sync sprints to assign start and end dates to Jira future sprints. Errant sprints shared across multiple boards will prevent the connector from making this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

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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:

1. Click the column name.



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.

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.

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Jira Sprints

Use the Jira Sprints tab to manage sprints that have been mapped between Jira and Jira Align . Click theJiraSprintstab, 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** > **Jira sprint mapping 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 auto-synchronize.
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.

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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:

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 work items 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.

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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 Work Items

You can generate the Jira Deleted Issues report to view all Jira Align items that are linked to a Jira work item that was permanently deleted by a user in Jira. Work items that had their parent space's permissions changed so that the Jira Connector Service Account no longer has permissions to view the work item 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, closed defects, and tasks that are children of accepted stories are not included in the report.

Notes:

- Work items in Jira were formerly known as issues. Jira Align is transitioning Jira language to this new term.
- 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 work items:

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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 personal preferences.
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 work item 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 work items for which Jira Align can no longer access via the API, indicating the permissions on the parent space changed or a work item was deleted in Jira (displayed with a red warning icon). If work items were previously synced to Jira Align and then then the Jira space was removed from the integration, the work items will not display on the report since. It is recommended that once a Jira space is removed from the integration, permissions are updated so the appropriate work items 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 work items 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.

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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**  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 Spaces** 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

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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 /rest/align/api/docs/index.html

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