



Jira Crawler Documentation

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Introduction

In this document, we will go through how to setup a Jira crawler in SimSage.

Prerequisites

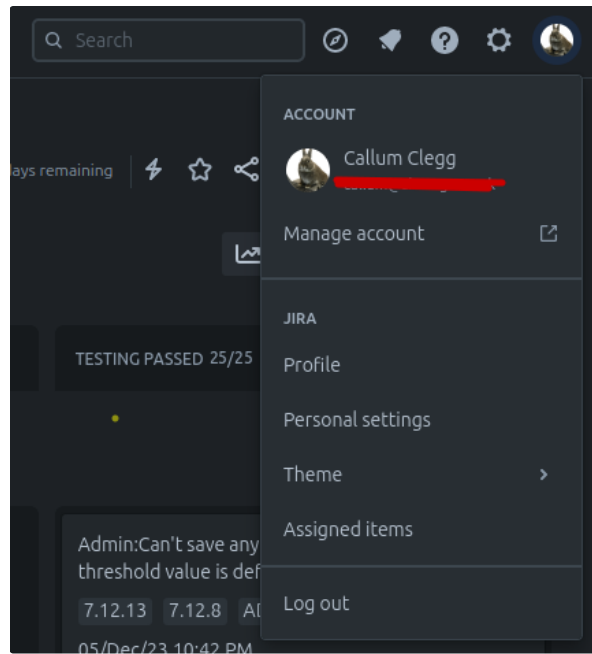
Before we create the crawler itself, we *must* be sure we have all the necessary credential in order for the crawler to work. These credentials are as follows:

- **Username** - the associated email of the Jira account
- **Base URL** - the common url of your Jira workstation
- **API Token** - a unique code you generate via account `manage account -> security`
- **Board Key** - the common key for each ticket present on board (e.g. **SM-XXX**)

If this is new to you, not to worry! We will explain where in Jira you can access this information.

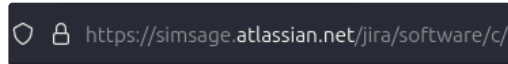
Username

Navigate to the Jira board and select your *profile icon* in the top right corner. This will present a drop down that will show the following:



Base URL

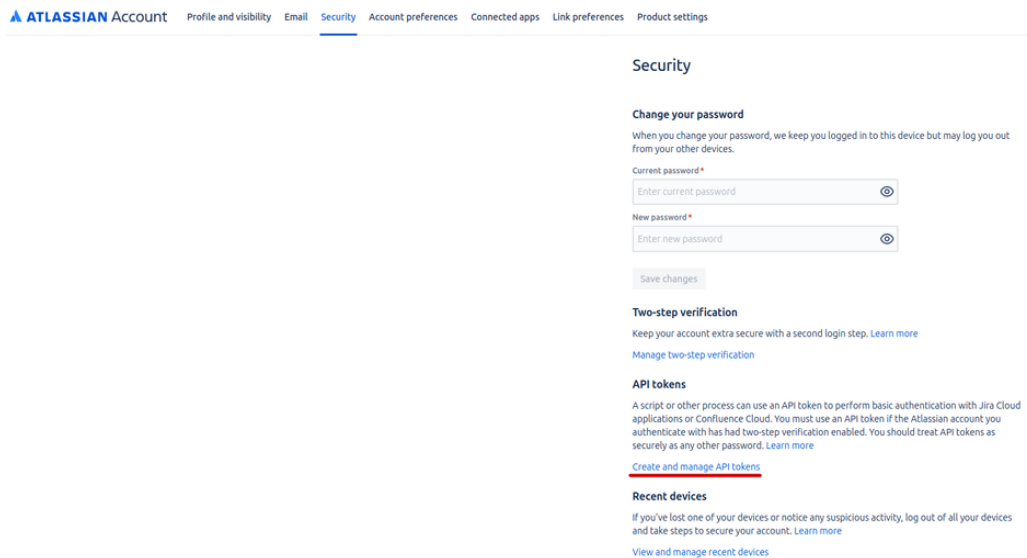
the base URL can be found in the address bar of any browser as shown below:



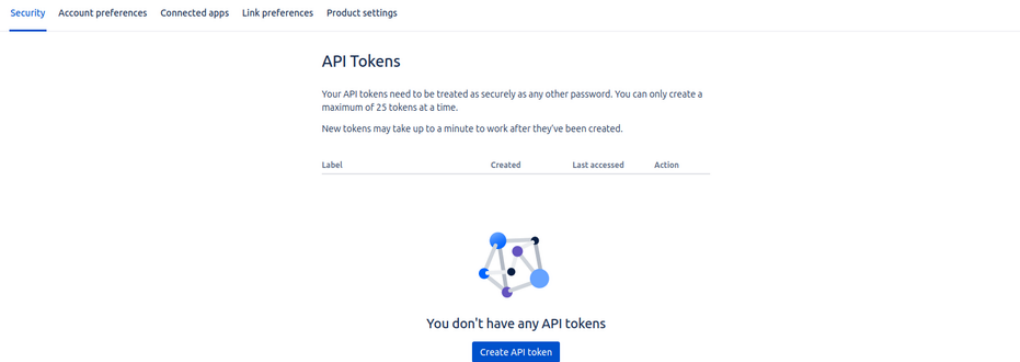
We are only interested in the *base*, therefore, everything after '.net' is irrelevant

API Token

To generate and copy a [API Token](#), we first need to navigate to `manage account -> security -> Create and manage API tokens`:



You should now be met with the following page:

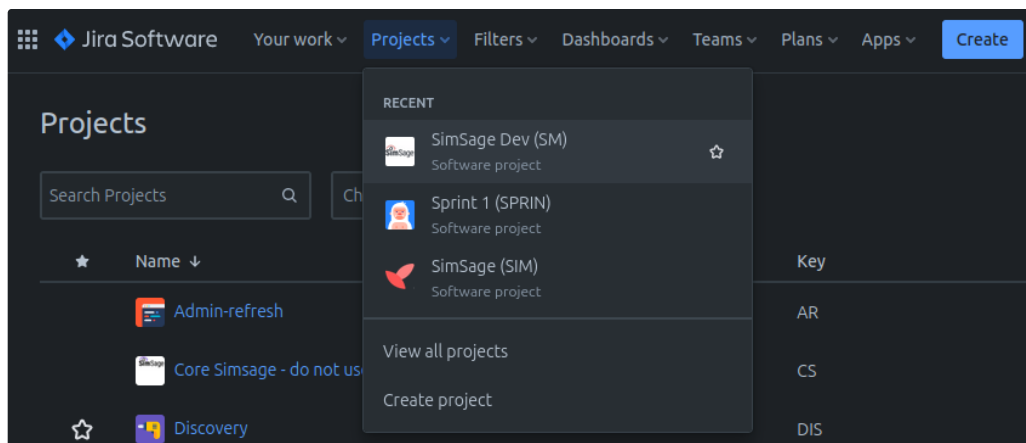


Select 'Create API Token' and name as desired.

⚠ Be sure to *immediately copy* this token, once set it cannot be view nor changed again.

Board Key

To find the board key, simply selecting the 'Projects' drop down, the keys are shown *within parenthesis*:



If the project you wish to crawl is not shown in the immediate drop down, select 'View all projects' to view all boards and their associate key under column 'Key':

Name	Key	Type	Lead
Admin-refresh	AR	Team-managed software	Max Webster
Core Simsage - do not use	CS	Team-managed software	Rock de Vocht
Discovery	DIS	Company-managed software	Max Webster

Setting Up the Jira Crawler

Now that we have all the necessary credentials, we can now instantiate a Jira Crawler.

Navigate to 'Document Management' and select '+ Add Source'. You will be prompted with the following:

Add Source

General

Jira Crawler

Metadata

ACLs

Processors

Schedule

Crawler Type

Jira crawler

Crawler Name *

Jira Crawler

Select the Jira crawler from the drop down, and name as desired.

Move the the tab 'Jira Crawler' and fill in the necessary fields as explained initially in this document:

Add Source

General

Jira Crawler

Metadata

ACLs

Processors

Schedule

username *

name@email.co.uk

base url *

https://simsage.atlassian.net

Jira Setup Guide

API Token *

board key *

SM

Close

Save

Be sure to view the 'Schedule' before saving.

Editing Crawler

Note when, editing a crawler, the 'API Token' field will always be left *empty* for security purposes, but rest assured, your originally entered token is saved in our db:

Edit Source: jira

General

Jira Crawler

Metadata

ACLs

Processors

Schedule

username *

name@simsage.co.uk

base url *

https://simsage.atlassian.net

Jira Setup Guide

API Token (leave blank to keep previous)

board key *

SM

Close

Test

Reset Delta

Save