Jira Crawler Documentation

Introduction

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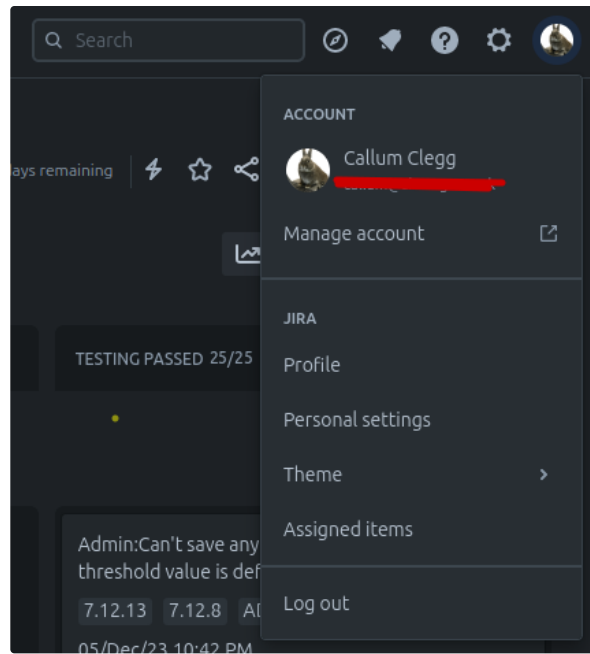
Prerequisites

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
- **Customer name** - the common name of your Jira account (e.g., **simsage** if your Jira url is https://simsage.atlassian.net/)
- **API Token** - a unique code you generate at https://id.atlassian.com/manage-profile/security/api-tokens
- **Board Key** - the common key for each ticket present on board (e.g. **SM** if your tickets numbers are like SM-2100)

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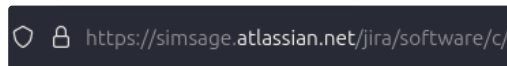
Username

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:
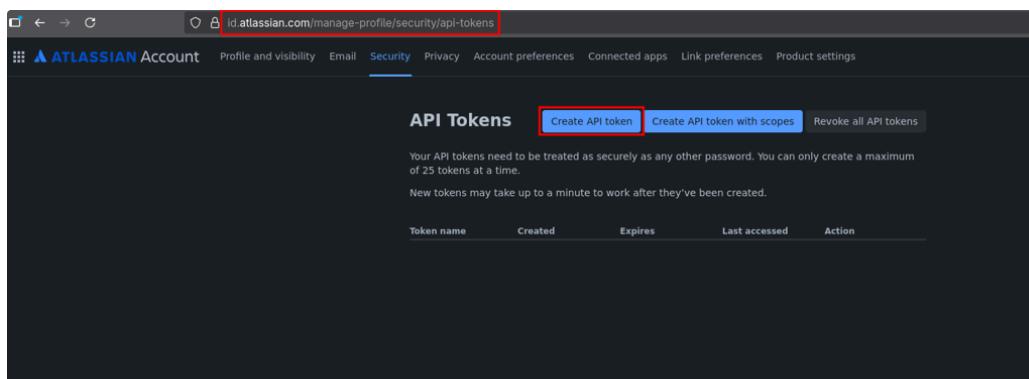
Customer name

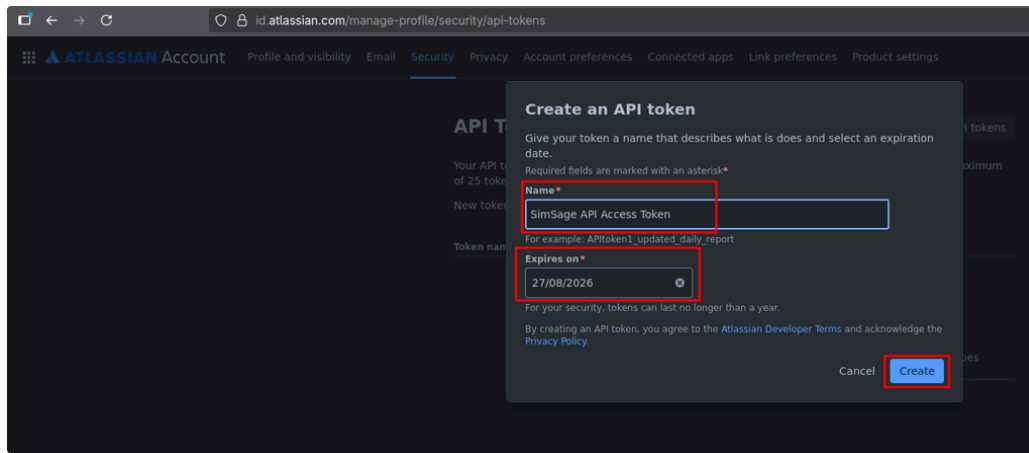the base URL can be found in the address bar of any browser as shown below:

> 📄 We are only interested in the *base,* therefore, in this example, your customer name is simsage.
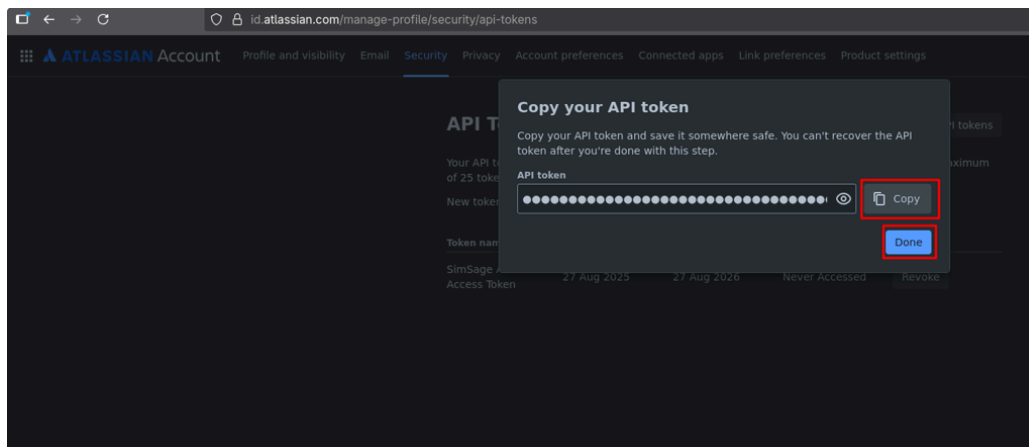
API Token

To generate and *copy* a API Token, we first need to navigate to https://id.atlassian.com/manage-profile/security/api-tokens:

Sign into Atlassian, and click "Create API token"

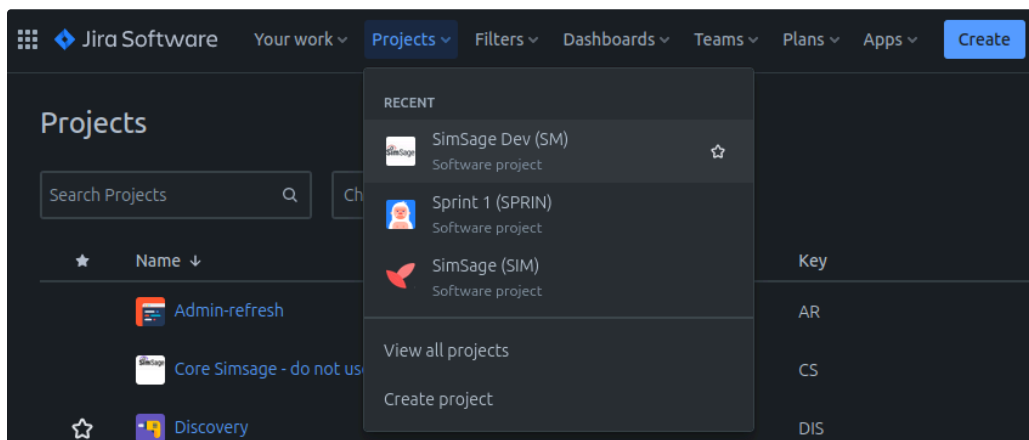Give the token a name and set the Expires on to a year from now

Copy the API token and store it somewhere save, then click Done

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

Board Key

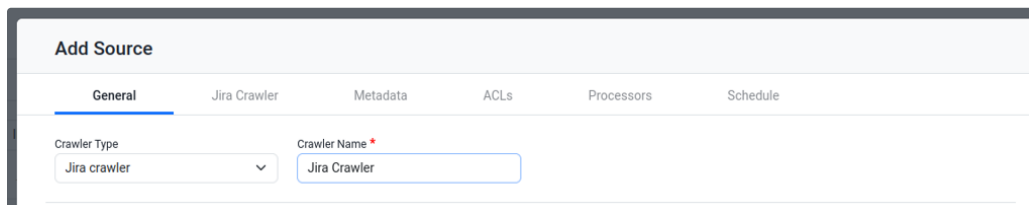To find the board key, simply selecting the 'Projects' drop down, the keys are shown *within parenthesis:*

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':

Setting Up the Jira Crawler

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

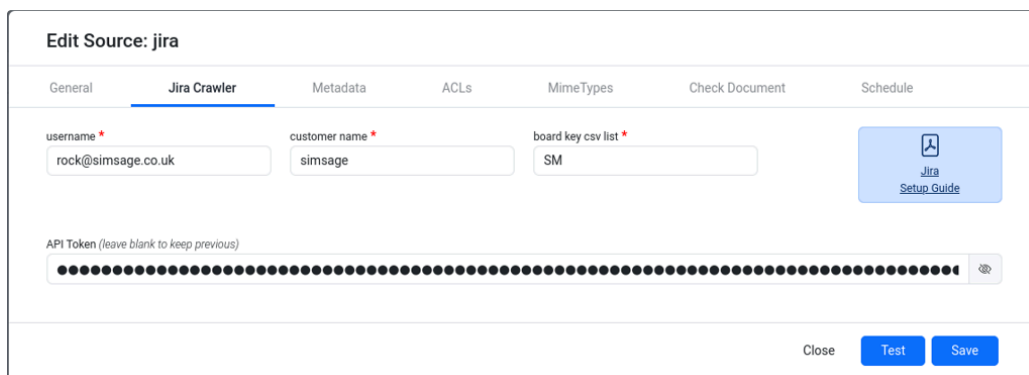Navigate to 'Document Management' and select '+ Add Source'. You will be prompted with the following:

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:

Enter your details, which will be different from this example

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 | MimeTypes | Check Document | Schedule

username *

rock@simsage.co.uk

customer name *

simsage

board key csv list *

SM

Jira
Setup Guide

API Token *(leave blank to keep previous)*

to create a new token visit: https://id.atlassian.com/manage-profile/security/api-tokens

Close   Test   Save