



## Jira Crawler Documentation

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## Introduction

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

## Prerequisites

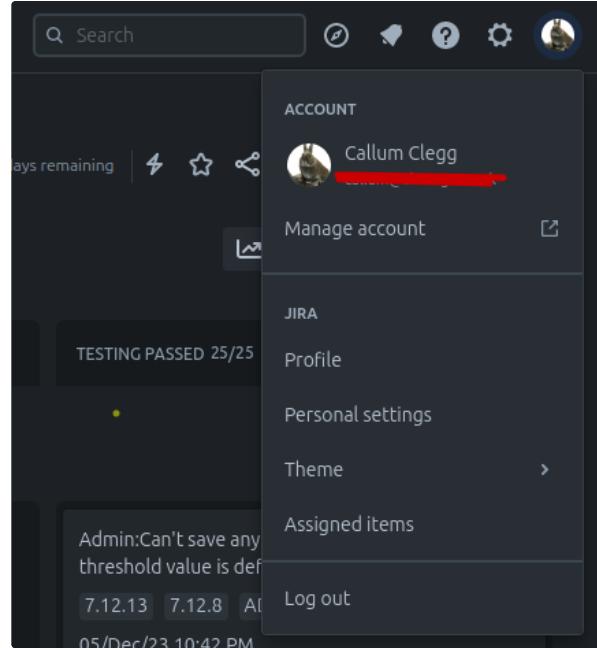
Before we create the crawler itself, we *must* be sure we have all the necessary credential in order for the crawler to work. These credentials are as follows:

- **Username** - the associated email of the Jira account
- **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:

https://simsage.atlassian.net/jira/software/c/

- 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>:

A screenshot of the Atlassian 'API Tokens' page. The URL in the browser is 'https://id.atlassian.com/manage-profile/security/api-tokens'. The page has a header with tabs for 'Profile and visibility', 'Email', 'Security', 'Privacy', 'Account preferences', 'Connected apps', 'Link preferences', and 'Product settings'. Below the header, there is a section titled 'API Tokens' with three buttons: 'Create API token' (which is highlighted with a red box), 'Create API token with scopes', and 'Revoke all API tokens'. A note below the buttons states: 'Your API tokens need to be treated as securely as any other password. You can only create a maximum of 25 tokens at a time.' and 'New tokens may take up to a minute to work after they've been created.' A table below the note lists columns for 'Token name', 'Created', 'Expires', 'Last accessed', and 'Action'.

Sign into Atlassian, and click "Create API token"

**Create an API token**

Give your token a name that describes what it does and select an expiration date.

Required fields are marked with an asterisk\*

Name\*  
SimSage API Access Token

Expires on\*  
27/08/2026

For example: APItoken1\_updated\_daily\_report

By creating an API token, you agree to the Atlassian Developer Terms and acknowledge the Privacy Policy.

Cancel **Create**

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

**Copy your API token**

Copy your API token and save it somewhere safe. You can't recover the API token after you're done with this step.

API token  
XXXXXXXXXXXXXXXXXXXX

**Done**

Name	SimSage API Access Token
Expires	27 Aug 2025
Last Accessed	27 Aug 2026
Revoked	Never Accessed

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*:

**Projects**

Search Projects

Name ↓

Admin-refresh

Core Simsage - do not use

Discovery

Key

AR

CS

DIS

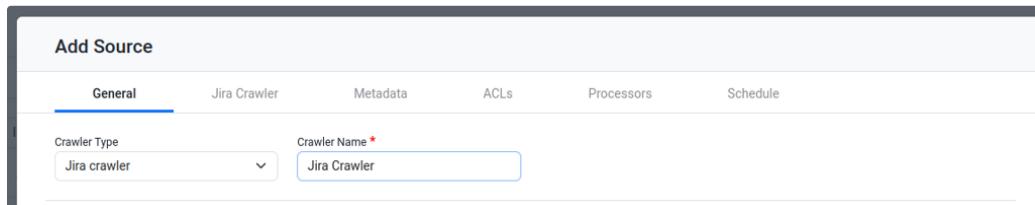
If the project you wish to crawl is not shown in the immediate drop down, select 'View all projects' to view all boards and their associate key under column 'Key':

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.

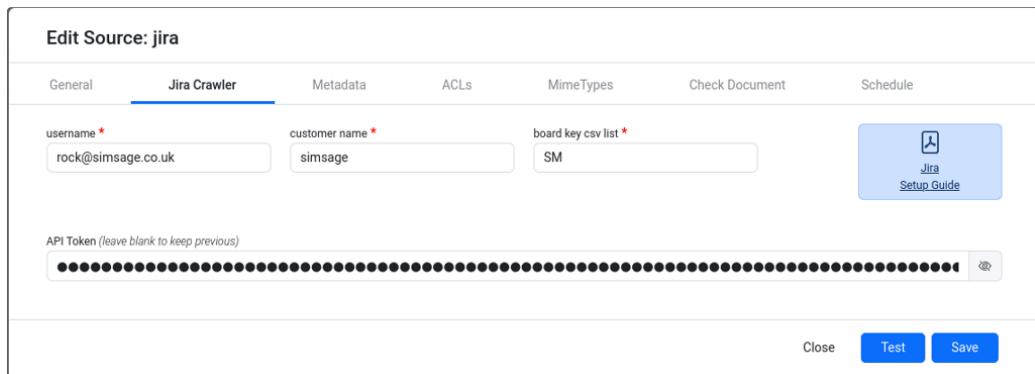
Navigate to 'Document Management' and select '+ Add Source'. You will be prompted with the following:



The screenshot shows the 'Add Source' interface with the 'General' tab selected. The 'Crawler Type' dropdown is set to 'Jira crawler'. The 'Crawler Name' field contains '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:



The screenshot shows the 'Edit Source: jira' interface with the 'Jira Crawler' tab selected. It displays fields for 'username' (rock@simsage.co.uk), 'customer name' (simsage), and 'board key csv list' (SM). A 'Setup Guide' button is visible. Below the form, a note says '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 \*  customer name \*  board key csv list \*

 [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](#)