



# ServicePRO JIRA

*ServicePRO –JIRA Integration  
User Reference guide*

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# 1. Overview

This document outlines the pre-requisites and steps that are required to configure the ServicePRO-JIRA Integration using the Zapier platform and ServicePRO JIRA Plug-in.

The following workflows can be configured through this integration:

- Creation of a new JIRA issue when a ServicePRO request is placed in a specific queue
- Two-way memo updates syncing between ServicePRO request and JIRA Issue
- Closing of the corresponding ServicePRO request when a JIRA issue is closed

The integration has been implemented by using the following components:

1. ServicePRO on Zapier
2. ServicePRO Custom Fields
3. JIRA Custom Fields
4. ServicePRO's JIRA Plug-in
5. ServicePRO Integration Service (Windows Service)
6. A JSON mapping file to specify the mappings between ServicePRO and JIRA fields, and to specify the filter criteria for queue folders to consider for initiating the sync operation, type of memos/traces to consider for initiating the sync operation.

## 1.1 ServicePRO to JIRA

ServicePRO to JIRA integration has been configured using ServicePRO's JIRA Plug-in, ServicePRO Integration Service (Windows Service) and a JSON mapping file.

In ServicePRO, when new service requests are created and moved to a specific designated queue folder, then the ServicePRO JIRA plug-in, in combination with the ServicePRO Integration Service invokes the JIRA API to create the same Issue in JIRA.

Likewise, when memo updates happen in service requests that have a corresponding JIRA Issue, then the ServicePRO JIRA plug-in, in combination with the ServicePRO Integration Service invokes the JIRA API to create a comment in the respective JIRA Issue.

## 1.2 JIRA to ServicePRO

ServicePRO to JIRA integration has been configured using Zaps on Zapier to invoke specific actions in ServicePRO based on specific triggers in JIRA.

ServicePRO application on Zapier platform facilitates the following two actions:

1. Add Memo in ServicePRO service request
2. Update Status in ServicePRO Service request

Zaps should be created in Zapier for the following scenarios:

- To track the trigger in JIRA Zapier app for addition of new comments in JIRA Issue and to invoke the 'Add Memo' action in ServicePRO Zapier app to add the memo into the respective ServicePRO service request.
- To track the trigger in JIRA Zapier app for closing of JIRA Issue and to invoke the 'Update Service Request' action in ServicePRO Zapier app to update the status to closed in the respective ServicePRO service request.

## 2. Pre-Requisites:

- ServicePRO's Web API is required to facilitate the integration with JIRA.
- 1 named ServicePRO license is required to access the ServicePRO Web API
- ServicePRO Web API URL should be public facing. It can either be on the premise or on the cloud.
- Minimum required Zapier plan for this integration is Professional
- Two custom fields, "**RequestID**" and "**Category**" must be created in JIRA
- The JIRA URL needs to be provided in order to get the custom field key in JIRA.
- User type 'JIRA' must be created in ServicePRO with the following custom text fields:
  - **Reporter Name**
  - **Assignee Name**
- Service Request Form must be created in ServicePRO with the following custom fields:

Label	Field Type	Values	Permissions
Projects	Drop down (Trace Enabled)	Enter the JIRA project key that needs to be integrated	View and Update
Issue Type	Drop down (Trace Enabled)	Enter the values that match the JIRA Issue Type (see Limitations Section)	View and Update
Issue Number	Text (Trace Enabled)		View

## 3. Implementation

### 3.1 ServicePRO to JIRA

#### 3.1.1 Required Permissions in JIRA

Modify reporter permission in JIRA for application access is required in order to map the ServicePRO reporter to JIRA reporter. If this permission is not given, then all the service requests created in ServicePRO will be mapped in JIRA to a default user specified in ServicePRO configuration.

**Note:** The email address of the reporters in ServicePRO and JIRA must match, if not, the request in JIRA will be created in the name of the default user.

#### 3.1.2 Generate API Token

API token is required for ServicePRO to connect to the JIRA Application. In order to get the API token navigate to <https://id.atlassian.com/manage/api-tokens> and create an API token.

#### 3.1.3 ServicePRO API Configuration

The following information is needed from the JIRA account for ServicePRO Configuration:

Fields	Sample Data	Interpretation	Comments
"Username"	<a href="#">ClientUserID@xxxx.com</a>	Jira account user's Email Address	The user who has access to Modify reporters & create project roles
"API Token"	"xxxxxxxxxxxxxxxxxxxxxx"	Jira API token reference	
"DefaultJIRAissueType"	"Story"	default Jira issue type	This is used when the Issue type is not specified by user while creating the Service Request.
"DefaultJIRAProjectKey"	"NTP"	default Jira project key where the JIRA ticket will get created	This is used when the Project is not specified by user while creating the Service Request.
"UseFirstMemoAsJIRADescription"	true	First memo created in Service request is used as Jira description	true or false can be entered, but the value is case sensitive. When true the first memo in ServicePRO will be displayed in description section of Jira ticket
"UsePrivateMemoForVisibility"	true		true or false can be entered, but the value is case sensitive. When true the private memo is enabled and will be visible only for particular Jira user role.

"JIRACommentVisibilityForPrivateMemo"	"Administrators"	The user who is given authority to view private memo	Required when "UsePrivateMemoForVisibility" is true.
"ScheduleJIRAIntegrationByMinutes"	1	The duration required for the service to run	Maximum minutes that can be specified is 5

## 3.2 JIRA to ServicePRO

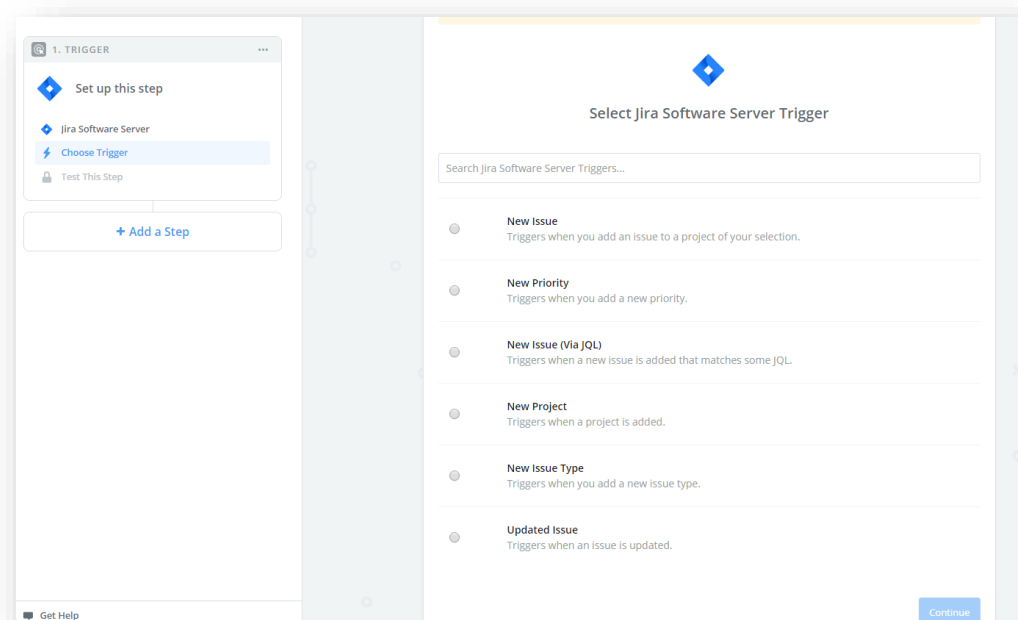
### 3.2.1 Create a Zapier account

- Navigate to <https://zapier.com> and create an account. Click on Make a Zap! button.

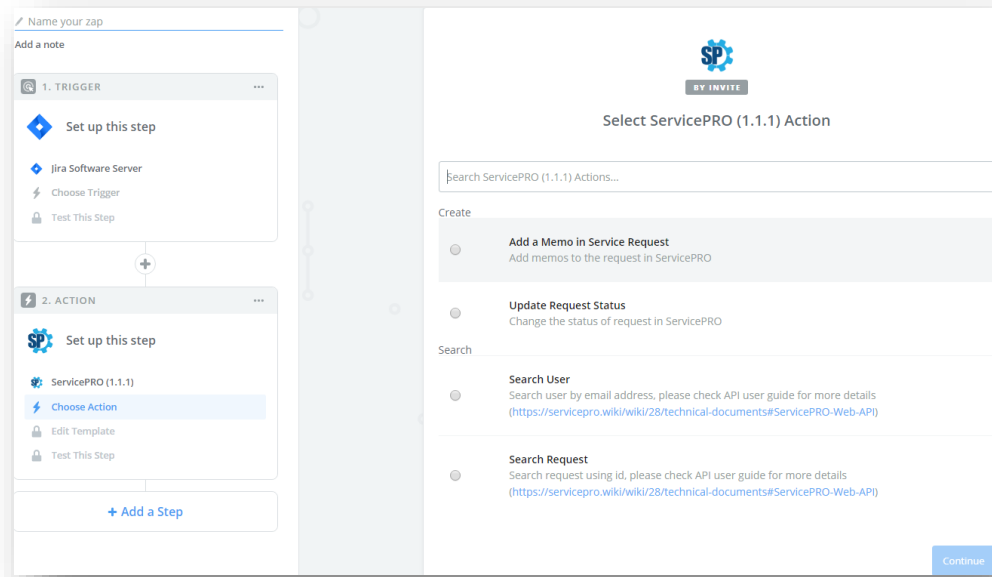
### 3.2.2 Create a Zap to update ServicePRO Request Memo

*Trigger:*

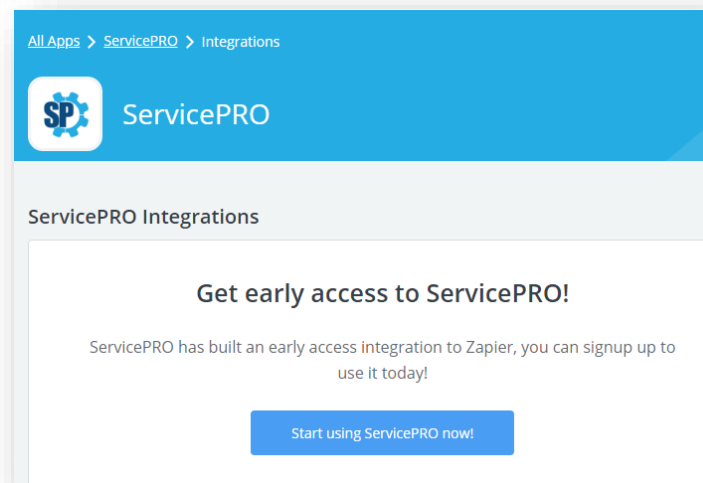
- Select <JIRA> as the trigger app and <Updated Issue> as the trigger, then click "Save+Continue" button.



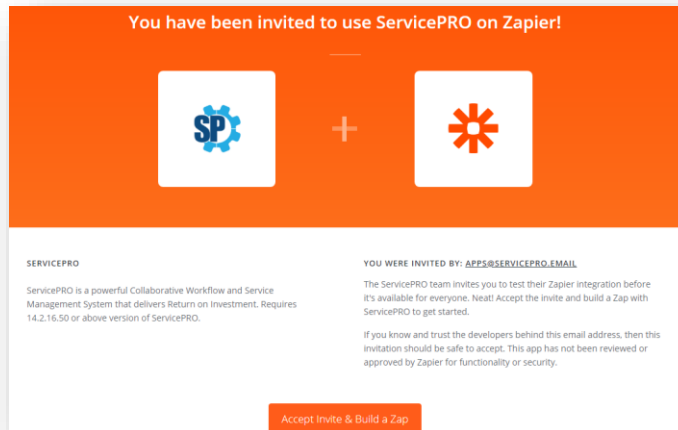
- Connect to the JIRA account by entering the JIRA URL, the Username, Password and the API token.
  - Select the project for which zaps should be created.
- Action:*
- Select <ServicePRO> as the Action app and <Add a Memo in Service Request> as the action and click 'Save + Continue'.



- If ServicePRO is not present in the Actions app drop down, navigate to <https://zapier.com/apps> and search for ServicePRO.



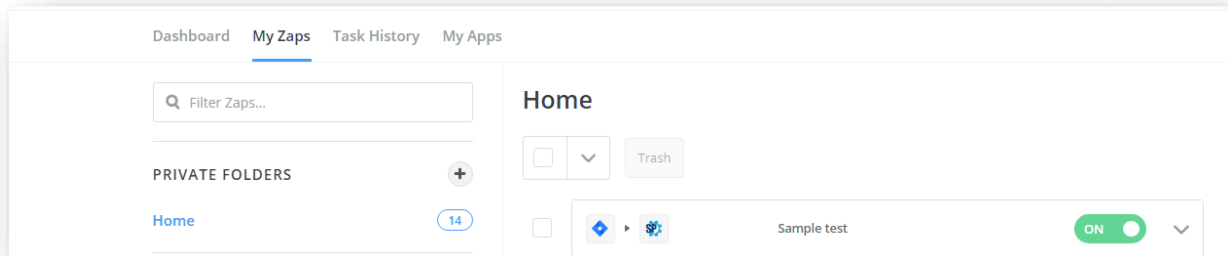
- Click “Start using ServicePRO now!” button.



- Click on “Accept Invite and Build a Zap”.
- Connect to the ServicePRO account by entering the API URL, the Username and Password.
- Under Set Template Map, map the appropriate fields.

ServicePRO	JIRA
Request Id	Fields Custom field key
Memo Id	Field Comment Comments ID
Memo Contents	Field Comment Comments Body
Memo Author	Field Comment Comments Author Email Address

- After the Test is successful enter the name of the Zap and turn it on.
- The created zap displays under “My Zaps” section:





### 3.2.3 Create a Zap to update status in ServicePRO

#### Trigger:

- Select the Trigger App <JIRA> and Software Triggers <Updated Issue> and continue to the next step.

#### Action:

- Create a filter to continue if the field status name is “Done” or “Closed”.
  - Tip: Navigate to JIRA’s board setting to verify the status.
- Setup formatter by Zapier Utilities.

The screenshot shows the configuration for a Zapier Transform step. It includes a 'Lookup Table' dropdown, a 'Values' section with a 'Lookup Key (optional)' field set to 'Fields Status Name', and a 'Lookup Table (optional)' section containing a table with 'Closed' as a key and '6' as a value.

- *Lookup Table Value for ServicePRO’s request status of “Closed” is “6”.*
- Select <ServicePRO> as the Action app and <Update Request Status> as the action and click ‘Save + Continue’.

## 4. Notes & Limitations

- When the comment format in JIRA is given as **‘Textcode’** with space then the ServicePRO request will not get updated with any further comments from JIRA. Therefore, please refrain from commenting in Jira using the **‘Textcode’** format.
- Creating the Issue Type **“Sub-task”** is out of scope for this release.
- The ServicePRO trigger to create a new JIRA issue will not be invoked if the ServicePRO request is dragged and dropped from dispatch to the designated queue.
- The ServicePRO-JIRA integration will be renewed annually in conjunction with the ServicePRO annual maintenance, however there will be no additional fee for renewing this feature.